

Lodi General Plan Update



Working Paper #3

Growth & Economic Development Strategy

July 2007

Draft

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I Introduction and Purpose

Lodi today is a city of nearly 63,000 residents and an employment base of about 22,000 jobs. Having managed its growth wisely during the past two decades while responding to the ever-changing demands of the marketplace, the City now looks to a future of considerable potential coupled with considerable challenges.

This paper provides background information about the recent growth and current characteristics of Lodi's population, housing stock, and employment base. It then considers retail sales in Lodi and the potential for additional tourism. Next, it considers the implications of projected population and employment growth for land demand in the new General Plan. Finally, it identifies policy issues that the City must consider as it works on the new General Plan.

This discussion of growth and economic development does not cover the fiscal condition of the City of Lodi; that is, the revenues collected by the City each year to fund ongoing operations and the costs of providing public services. Fiscal issues will be considered later

2 Population and Demographics

Lodi's population has grown from about 57,000 residents in 2000 to its current size of 63,000. The population in 2000 was slightly older, slightly more diverse in terms of race and ethnicity, and slightly better educated than it was in 1990. Population growth is expected to continue at a modest pace (less than the limit of two percent per year adopted by the City) through the next several decades.

2.1 POPULATION GROWTH

Lodi's population has grown at an average rate of between about one and two percent per year since 1990. There were a couple of higher-growth years at the beginning of this decade, but the rate of increase has declined steadily since 2003.

Table 2.1-1. Population Growth, 1990-2006

<i>Year</i>	<i>Population</i>	<i>Increase</i>	<i>% Change</i>
1990	51,874		
2000	56,999	5,125	9.8%*
2001	58,355	1,356	2.4%
2002	59,830	1,475	2.5%
2003	60,948	1,118	1.9%
2004	61,917	969	1.6%
2005	62,632	715	1.2%
2006	62,817	185	0.3%

** Equivalent to average annual growth rate of 0.9% over a 10-year period.*

Source: 1990 and 2000 from US Census; 2001-2006 from California Department of Finance

Population growth in Lodi has been slower than growth in the other larger San Joaquin County cities, the county as a whole, or the State of California. Table 2.1-2 compares population growth in Lodi since 1990 to growth in nearby cities, San Joaquin County, and the State of California, and Figure 2.1-1 shows Lodi's population growth relative to population growth in the other cities of San Joaquin County since 2000.

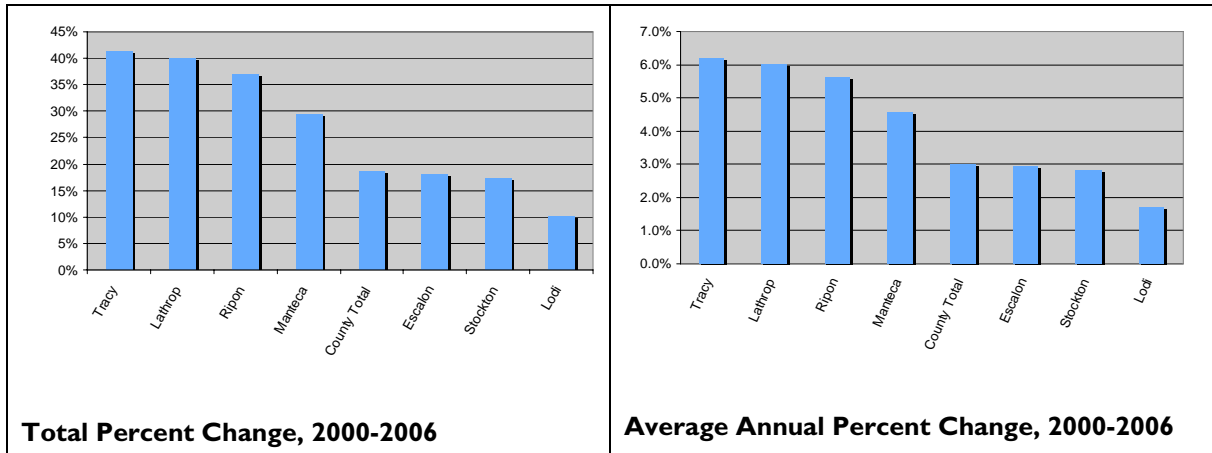
Table 2.1-2. Comparison of Population Growth in Selected Areas, 1990-2006

	<i>Lodi</i>	<i>Stockton</i>	<i>Tracy</i>	<i>San Joaquin Co.</i>	<i>California</i>
<i>Population</i>					
1990	51,874	210,943	3,3558	480,628	29,758,213
2000	56,999	243,771	56,929	563,598	33,871,648
2006	62,817	286,041	80,461	668,265	37,172,015
<i>Percent Change</i>					
1990-2000	10%	16%	70%	17%	14%
2000-2006	10%	17%	41%	19%	10%
1990-2006	21%	36%	140%	39%	25%
<i>Average Annual Percent Change</i>					
1990-2000	0.9%	1.5%	5.4%	1.6%	1.3%
2000-2006	1.6%	2.7%	5.9%	2.9%	1.6%
1990-2006	1.2%	1.9%	5.6%	2.1%	1.4%

Source: 1990 and 2000 from US Census; 2006 from California Department of Finance

Lodi has grown at a rate of more than two percent during only two years in this decade, and as shown in the table above, the overall rate since 1990 has averaged only 1.2 percent per year. One observer during the stakeholder meetings conducted for the General Plan Update suggested that the actual growth rate may be lower than the maximum permitted rate partly as a consequence of the mechanics of the development allocation process and the procedures for granting entitlements to the land that is available. Other possible explanations are that easily developable land is not readily available, or that that Lodi is just far enough from the Bay Area and Sacramento employment centers to be beyond a reasonable commute distance for people working in those areas (in contrast to Tracy and Stockton, which have attracted some Bay Area workers).

Figure 2.1-1. Comparison of Population Growth in Selected Areas, 2000-2006



2.2 POPULATION CHARACTERISTICS

AGE OF THE POPULATION

The median age of Lodi residents was slightly higher in 2000 than it was in 1990 (34.1 years old vs. 33.3 years old), but, based on the population groupings reported in the US Census, the population appears to be slightly younger: greater proportions are aged 5-14 and 15-24, and smaller proportions are aged 25-64, 65-85, and 95+. The shift is not great enough to be significant, but it is possible to conclude that young working-age people are finding it harder to locate jobs and/or housing in Lodi, or choosing not to live in Lodi for other reasons.

Table 2.2-1. Age of the Population

	<i>Lodi</i>		<i>San Joaquin Co.</i>	<i>California</i>
	<i>1990</i>	<i>2000</i>	<i>2000</i>	<i>2000</i>
Under 5 years	7.9%	7.9%	8.0%	7.3%
5 to 9 years	7.3%	8.0%	9.0%	8.0%
10 to 14 years	6.4%	7.8%	8.9%	7.6%
15 to 19 years	6.1%	7.3%	8.5%	7.2%
20 to 24 years	7.1%	6.8%	6.7%	7.0%
25 to 34 years	18.2%	13.3%	13.4%	15.4%
35 to 44 years	14.2%	14.8%	15.4%	16.2%
45 to 54 years	9.1%	12.1%	12.2%	12.8%
55 to 64 years	8.0%	7.6%	7.4%	7.7%
65 to 74 years	7.7%	6.5%	5.4%	5.6%
75 to 84 years	5.5%	5.5%	3.8%	3.8%
85 years and over	2.5%	2.3%	1.3%	1.3%
Median age (years)	33.3	34.1	31.9	33.3

Source: US Census, 1990 and 2000

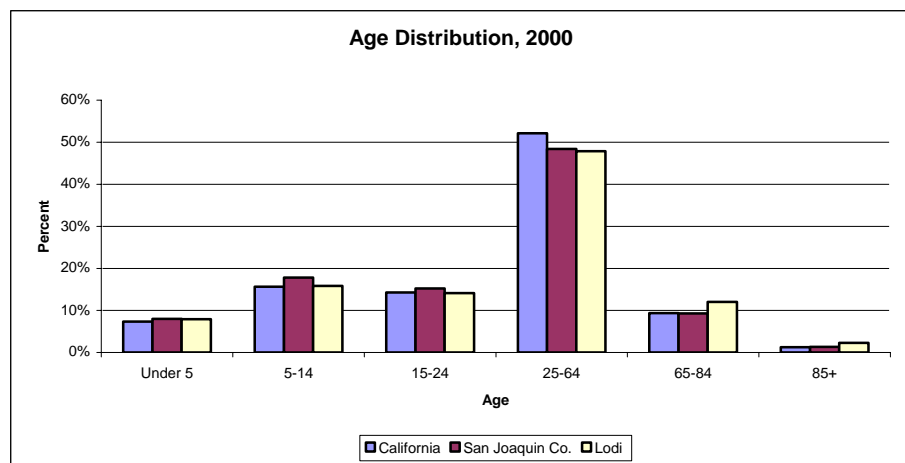
The median age of Lodi's population is slightly higher than the median in San Joaquin County as a whole or the State of California as a whole. The proportion of Lodi residents aged 65 and older is higher than in the County or State as a whole, but lower in 2000 than it was in 1990

Table 2.2-2. Age of the Population (Grouped)

	<i>Lodi</i>		<i>San Joaquin Co.</i>	<i>California</i>
	<i>1990</i>	<i>2000</i>	<i>2000</i>	<i>2000</i>
Under 5	7.9%	7.9%	8.0%	7.3%
5-14	13.7%	15.8%	17.8%	15.6%
15-24	13.2%	14.1%	15.2%	14.3%
25-64	49.5%	47.8%	48.4%	52.1%
65-84	13.2%	12.0%	9.3%	9.4%
85+	2.5%	2.3%	1.3%	1.3%

Source: US Census, 1990 and 2000

Figure 2.2-2. Age Distribution, 2000: Comparisons



RACE AND ETHNICITY

The population of Lodi remains heavily white, but a noticeable amount of diversity emerged between 1990 and 2000. Specifically, the proportion of residents who identify as Asian grew slightly, and the proportion who identify as “some other race” nearly tripled between the censuses.

Approximately 27 percent of Lodi residents in 2000 were Hispanic, compared to about 17 percent in 1990.

Table 2.2-3. Race and Ethnicity

	1990	2000
White	89.3%	74.4%
Black or African American	0.3%	0.6%
American Indian and Alaska Native	0.9%	0.9%
Asian	4.7%	5.1%
Native Hawaiian/Other Pacific Islander		0.1%
Some other race	4.8%	14.0%
Two or more races	n.a.*	4.9%
Hispanic (any race)	16.9%	27.1%

* This reporting option not available in 1990.

Source: US Census, 1990 and 2000

EDUCATION

The educational attainment of Lodi residents improved between 1990 and 2000: in 2000, about 73 percent of all residents 25 years old or older had graduated from high school, and more than 15 percent had graduated from college. This level of educational achievement was slightly better than that of the countywide population, but not as high as the state as a whole.

Table 2.2-4. Educational Attainment (Population 25 years and older)

	Lodi		San Joaquin Co.	California
	1990	2000	2000	2000
Population 25 years and over	34,022	35,047	333,572	21,298,900
Less than 9th grade	13.8%	12.4%	13.3%	11.5%
9th to 12th grade, no diploma	13.9%	14.8%	15.5%	11.7%
High school graduate*	29.3%	25.4%	25.2%	20.1%
Some college, no degree	21.8%	23.9%	23.9%	22.9%
Associate degree	7.3%	7.9%	7.6%	7.1%
Bachelor's degree	9.5%	10.8%	10.2%	17.1%
Graduate or professional degree	4.4%	4.8%	4.4%	9.5%
Percent high school graduate or higher	72.3%	72.9%	71.2%	76.8%
Percent bachelor's degree or higher	13.9%	15.6%	14.5%	26.6%

* Includes equivalency.

Source: US Census, 1990 and 2000

2.3 PROJECTED POPULATION GROWTH

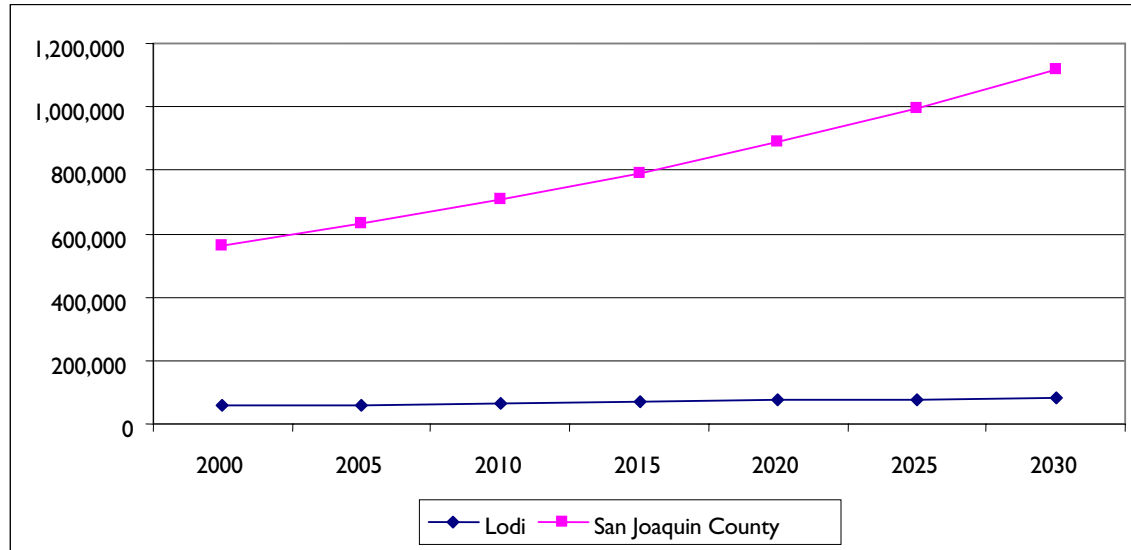
The San Joaquin Council of Governments (SJCOG) prepares projections of population and employment for the county and its cities. The most recent projections anticipate that Lodi's population will increase from about 60,900 residents in 2005 to 81,720 residents in 2030. This amount of growth represents an annual average increase of 1.2 percent per year over the 25-year period.

For comparison, SJCOG expects the population of San Joaquin County to grow at an average annual rate of 2.3 percent. With a slower growth rate than the County, Lodi will see its share of countywide population decline from 9.7 percent in 2005 to 7.3 percent in 2030.

Table 2.3-1. Projected Population Growth: Lodi and San Joaquin County

	2000	2005	2010	2015	2020	2025	2030
<i>Population</i>							
Lodi	56,999	60,913	65,283	69,451	73,697	78,028	81,720
San Joaquin Co.	563,598	630,313	708,364	792,998	888,536	995,132	1,117,006
<i>Average annual % change from previous date</i>							
Lodi		1.3%	1.4%	1.2%	1.2%	1.1%	0.9%
San Joaquin Co.		2.3%	2.4%	2.3%	2.3%	2.3%	2.3%
<i>Average annual absolute change from previous date</i>							
Lodi		783	874	834	849	866	738
San Joaquin Co.		13,343	15,610	16,927	19,108	21,319	24,375
<i>Lodi as % of San Joaquin Co.</i>							
	10.1%	9.7%	9.2%	8.8%	8.3%	7.8%	7.3%

Source: SJCOG Projections (from Lesley Miller, e-mail to M&A, 1-2-07)

Figure 2.3-1. Projected Population Growth in Lodi and San Joaquin County, 2000-2030

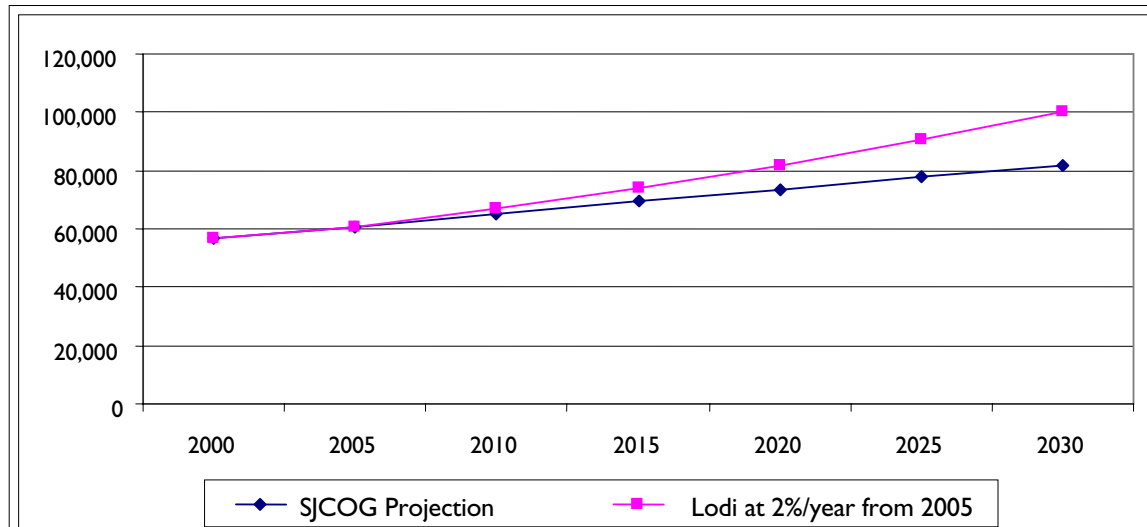
Note that SJCOG's projection anticipates less population growth than would occur if Lodi were to grow at a rate of two percent per year, which is the maximum rate currently permitted by City policy.

Table 2.3-2. Population Growth: Comparison of SJCOG Projection with Maximum Permitted Growth

Area	2005	2010	2015	2020	2025	2030
SJCOG	60,913	65,283	69,451	73,697	78,028	81,720
Change from 2005		4,370	8,538	12,784	17,115	20,807
Maximum Permitted	60,913	67,253	74,253	81,981	90,514	99,934
Change from 2005		6,340	13,340	21,068	29,601	39,021

Source: SJCOG; Mundie & Associates

Figure 2.3-2. Potential Growth in Lodi: Comparison of SJCOG Projection to Maximum Permitted by Lodi Growth



Management Ordinance

Population growth in Lodi is likely to increase the number of residents in each age group. Given available information, it is not possible to derive a defensible projection of population by age group: complicating factors include not only birth rates and death rates by age, but also in- and out-migration, which may be affected by housing prices, job opportunities, the quality of medical care (high-quality care could increase the number of retirees who move to the area as well as the number of CEOs who choose Lodi for a business location), and the availability of housing oriented to various age groups, including seniors.

3 Housing and Households

Lodi's housing stock is comprised primarily of single family homes. Units typically have four to six rooms, including two to three bedrooms. About half of the units were built before 1980. Slightly more than half of the units are owner-occupied. The median price of for-sale units is slightly lower than the median in the County as a whole and in other nearby cities.

Similarly, the median household income in Lodi is slightly lower than the median in the County and other nearby cities.

3.1 HOUSING STOCK

Number of Units

Lodi added about 250 housing units per year between 1990 and 2006, yielding an average annual growth rate of about one percent for the 16-year period.

Table 3.1-1. Housing Units

<i>Year</i>	<i># Units</i>	<i>% Change</i>
1990	19,676	
2000	21,400	8.76%*
2001	21,611	2.75%
2002	21,988	1.74%
2003	22,192	0.93%
2004	22,466	1.23%
2005	22,762	1.32%
2006	23,000	1.05%

* Equivalent to average annual growth rate of 0.8% over 10 years.

Source: 1990 and 2000 from US Census; 2001-2006 from California Department of Finance

TYPES OF STRUCTURES

Lodi's housing stock is dominated by single family structures: in 2006, about 71 percent of all housing units were in single family homes (for comparison, single family homes accounted for about 67 percent of all housing units in 2000). During the current decade, 99 percent of all new homes in Lodi (including those in areas that have been annexed) were in single family structures. The City has added only 20 new multi-family units since 2000.

Table 3.1-2. Composition of the Housing Stock

	Number			% Change		
	Total	Single	Multiple	Total	Single	Multiple
2000	21,381	14,675	6,242			
2001	21,611	14,897	6,250	1.1%	1.51%	0.13%
2002	21,988	15,272	6,252	1.7%	2.52%	0.03%
2003	22,192	15,472	6,256	0.9%	1.31%	0.06%
2004	22,466	15,740	6,262	1.2%	1.73%	0.10%
2005	22,762	16,036	6,262	1.3%	1.88%	0.00%
2006	23,000	16,273	6,262	1.05%	1.48%	0.00%

Source: California Department of Finance

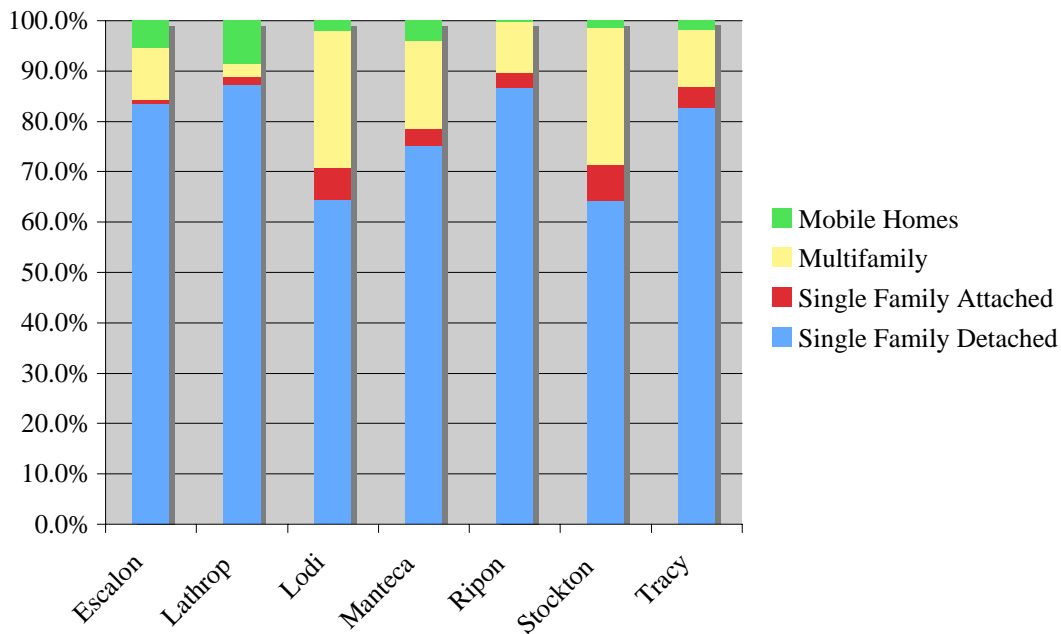
Even though Lodi's housing stock is dominated by single family units, it has a greater proportion of multi-family units (about 27 percent) than does the rest of San Joaquin County (about 18 percent). All together, about 75 percent of the housing in the incorporated areas of the county (the areas within cities, including Lodi) was in single family structures; in the county as a whole, the proportion in single family structures is 77 percent. For comparison, California had about 65 percent single family homes, 31 percent multi-family homes, and 5 percent mobile homes.

Table 3.1-3. Composition of the Housing Stock: Lodi, San Joaquin County, and California, 2006

	Total	Single Family		Multi-Family		Mobile Home
		Attached	Detached	2-4 Units	5+ Units	
Lodi	23,000	14,797	1,476	1,762	4,500	465
All incorporated areas	174,963	121,900	10,045	12,709	26,715	3,594
San Joaquin Co.	219,717	157,953	11,299	13,525	27,367	9,573
California	13,140,388	7,533,408	949,741	1,051,594	3,018,657	586,988

	Total	Single Family		Multi-Family		Mobile Home
		Attached	Detached	2-4 Units	5+ Units	
Lodi	100.0%	64.3%	6.4%	7.7%	19.6%	2.0%
All incorporated areas	100.0%	71.3%	5.3%	6.3%	12.6%	4.4%
San Joaquin Co.	100.0%	71.9%	5.1%	6.2%	12.5%	4.4%
California	100.0%	57.3%	7.2%	8.0%	23.0%	4.5%

Source: California Department of Finance

Figure 3.1-1. Composition of the Housing Stock in San Joaquin County Cities, 2006

NUMBER OF ROOMS

Information about the characteristics of the housing stock is available from the 2000 U.S. Census. The census indicates that nearly one-quarter of all units in Lodi at the time of the Census had five rooms; about one-fifth had four rooms, and about one-sixth had six rooms. The median size was 4.9 rooms (a slight increase from the 1990 median of 4.8 rooms).

Table 3.1-4. Characteristics of the Lodi Housing Stock: Number of Rooms

	Number	Percent
1 room	648	3.0%
2 rooms	1,828	8.5%
3 rooms	2,158	10.1%
4 rooms	4,182	19.5%
5 rooms	4,913	23.0%
6 rooms	4,021	18.8%
7 rooms	2,178	10.2%
8 rooms	942	4.4%
9 or more rooms	530	2.5%
Total	21,400	100.0%
Median (rooms)	4.9	

Source: US Census, 2000

NUMBER OF BEDROOMS

The Census also reports the number of bedrooms in each housing unit. In Lodi, about 40 percent of all units had three bedrooms, about 30 percent had two bedrooms, and nearly 15 percent had one bedroom.

Owner-occupied units tended to have more bedrooms. Nearly 60 percent of owner-occupied units had three bedrooms, while only about 20 percent had two bedrooms and fewer than 5 percent had one bedroom. Rental units, in contrast, tended to have fewer bedrooms than the average: less than 20 percent had three bedrooms, while more than 40 percent had two bedrooms and about one-quarter had only one bedroom. Ten percent of the rental units were studios (no bedrooms).

Table 3.1-5. Characteristics of the Lodi Housing Stock: Number of Bedrooms

	Number			Percent		
	Total	Owner Occupied	Renter Occupied	Total	Owner Occupied	Renter Occupied
0 BR	1,059	116	943	5.1%	1.0%	10.0%
1 BR	3,005	511	2,494	14.5%	4.5%	26.4%
2 BR	6,398	2,280	4,118	30.9%	20.2%	43.7%
3 BR	8,294	6,565	1,729	40.1%	58.3%	18.3%
4 BR	1,702	1,568	134	8.2%	13.9%	1.4%
5+ BR	236	224	12	1.1%	2.0%	0.1%
Total	20,694	11,264	9,430	100.0%	100.0%	100.0%

Source: US Census, 2000 (sample data from summary tape file 4)

AGE OF THE HOUSING STOCK

The decade of greatest growth in Lodi was the 1980s, when about 20 percent of all units were built, followed by the 1970s, with about 17 percent, and the 1960s, with about 14 percent. Nearly 10 percent of Lodi's housing units were built before 1940, and seven percent between 2000 and 2008. By comparison, about 21 percent of the units in Manteca, nearly 28 percent of the units in Tracy, and 13 percent of the units in Stockton were built between 2000 and 2006. In Lodi, just fewer than 20 percent of all units have been built since 1990; in Manteca, Tracy, and Stockton, the comparable figures are 36 percent, 55 percent, and 26 percent, respectively.

Table 3.1-6. Characteristics of the Lodi Housing Stock: Year Structure Built

	Lodi		Manteca	Tracy	Stockton	San Joaquin Co.
	Number	Percent				
2000-2006	1,619	7.0%	21.1%	27.7%	13.0%	13.9%
1990-1999	2,734	11.9%	15.3%	27.9%	13.9%	15.1%
1980 to 1989	4,590	19.9%	22.3%	16.0%	15.5%	16.3%
1970 to 1979	4,014	17.4%	18.4%	9.2%	21.6%	17.9%
1960 to 1969	3,242	14.1%	9.4%	5.9%	12.6%	12.0%
1940 to 1959	4,718	20.5%	11.5%	10.0%	16.0%	17.8%
1939 or earlier	2,102	9.1%	2.1%	3.3%	7.4%	7.0%
Total	23,019	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Data through 1999 from US Census; 2000-2006 from California Department of Finance

HOUSING TENURE

Lodi households are almost evenly divided between owners and renters: according to both the 1990 Census and the 2000 Census, between 54 and 55 percent of housing units were owner-occupied, and between 45 and 46 percent were renter-occupied. These figures, combined with the information about structure type, indicate that a substantial number of single family units are occupied by renters.

Table 3.1-7. Characteristics of the Lodi Housing Stock: Tenure

	1990		2000	
	Number	Percent	Number	Percent
Owner-occupied	10,317	54.3%	11,308	54.6%
Renter-occupied	8,684	45.7%	9,384	45.4%
Total	19,001	100.0%	20,692	100.0%

Source: US Census, 2000 (sample data from summary tape file 4)

VACANCY RATE

The Lodi housing market is characterized by low vacancy rates. In 1990, the US Census reported vacancy rates of less than one percent for homeowners (for-sale units) and 4.4 percent for renters (for-rent units). In 2000, the Census reported a slightly higher vacancy rate for homeowners (1.2 percent) but a lower rate for renters (less than 3 percent). The California Department of Finance assumes a combined vacancy rate of 3.21 percent. For comparison, a vacancy rate of less than five percent is typically assumed to indicate a “tight” housing market, where households may not be able to find vacant units that meet their needs.

Table 3.1-8. Characteristics of the Lodi Housing Stock: Vacancy Rates

	1990	2000
Homeowner vacancy rate	0.9%	1.2%
Rental vacancy rate	4.4%	2.9%

Source: US Census, 1990 and 2000

A comparison Lodi to San Joaquin County and the state as a whole shows that the homeowner vacancy rate in Lodi was about the same as in the county, and that the rate in Lodi and the county was slightly lower than throughout California. The renter vacancy rate in Lodi was lower than the rate throughout San Joaquin County or the rate in California.

Table 3.1-9. Homeowner and Renter Vacancy Rates: Lodi, San Joaquin County, and California, 2000

	Lodi	San Joaquin Co.	CA
Homeowner Vacancy Rate	1.2%	1.2%	1.4%
Renter Vacancy Rate	2.9%	3.8%	3.7%

MEDIAN PRICE

According to the California Association of Realtors, the median price for a home in Lodi (including single family homes and condominiums, both new and pre-owned) in November, 2006 was \$352,500. This price was about 16 percent lower than the November 2005 median price of \$419,750, reflecting the current softening of the housing market in general.

Table 3.1-10. Median Housing Price: Lodi and Nearby Areas

Area	Median Price		Percent Change
	November, 2006	November, 2005	
San Joaquin Co.	\$419,000	\$440,250	-4.8%
Lodi	352,500	419,750	-16.0%
Manteca	399,000	462,750	-13.8%
Stockton	355,000	388,500	-8.6%
Tracy	529,000	595,500	-11.2%

Source: California Association of Realtors

3.2 HOUSEHOLDS

HOUSEHOLD SIZE AND COMPOSITION

The average household in Lodi has between two and three members: the median has risen from 2.6 in 1990 to about 2.8 in 2006.

The great majority of households in Lodi—about 70 percent—are “family households”; that is, they have at least two people who are related to each other by blood or marriage. Of those, more than half (36 percent of all households, 51 percent of family households) have children under the age of 18 living at home. Of the non-family households, more than 80 percent are comprised of a single person.

Table 3.2-1. Household Composition

	1990		2000	
	Number	Percent	Number	Percent
Total Households	19,001		20,692	
Family Households	13,299	70%	14,349	69%
With Children	6,816	36%	7,400	36%
With No Children	6,483	35%	6,949	33%
Non-family Households	5,702	30%	6,343	31%
Householder living alone	4,566	24%	5,259	25%
Householder not living alone	1,136	6%	1,084	5%

Source: US Census, 1990 and 2000

HOUSEHOLD INCOME

Median household income in Lodi rose by nearly 30 percent between 1989 (as reported in the 1990 census) and 1999 (as reported in the 2000 census), from just under \$31,000 per year to just under \$40,000 per year. When adjusted for inflation, however, real income declined by about five percent.

The median household income in Lodi was slightly higher than the countywide median in 1989, but lower in 1999. The median in Lodi was lower than the statewide median in both years.

Table 3.2-2. Household Income

	1989		1999	
	Number	Percent	Number	Percent
Households	19,121	100.0%	20,567	100.0%
Less than \$10,000	2,492	13.0%	1,974	9.6%
\$10,000 to \$14,999	1,747	9.1%	1,439	7.0%
\$15,000 to \$24,999	3,538	18.5%	2,954	14.4%
\$25,000 to \$34,999	3,049	15.9%	2,795	13.6%
\$35,000 to \$49,999	3,747	19.6%	3,360	16.3%
\$50,000 to \$74,999	3,123	16.3%	3,948	19.2%
\$75,000 to \$99,999	853	4.5%	1,997	9.7%
\$100,000 to \$149,999	366	1.9%	1,403	6.8%
\$150,000 to \$199,999	206	1.1%	426	2.1%
\$200,000 or more			271	1.3%

Source: US Census, 1990 and 2000

Table 3.2-3a. Median Household Income, Nominal Dollars

	1989	1999	% change
Lodi	\$30,739	\$39,570	28.7%
San Joaquin Co.	30,635	41,282	34.8%
California	35,798	47,493	32.7%

Table 3.2-3b. Median Household Income, Constant 1999 Dollars

Constant Dollars	1989	1999	% change
Lodi	\$41,668	\$39,570	-5.0%
San Joaquin Co.	41,527	41,282	-0.6%
California	48,526	47,493	-2.1%

Source: US Census, 1990 and 2000; adjustment to constant dollars based on the consumer price index for all urban consumers, U.S. Western Region, from U.S. Department of Labor, Bureau of Labor Statistics

4 Economic Characteristics

The economy of an area is the collection of businesses and jobs located there. Economic activity is typically considered to be organized into two groups: “basic activity,” which serves a customer base that is larger than the local area, and “secondary, or local-serving, activity,” which serves the local area. Basic activity brings money into the area that may then be spent by businesses and households at businesses in the local-serving group.

Lodi’s economic base (its basic economic activity) has historically been concentrated on agriculture and manufacturing. Agriculture is a natural result of the City’s location in one of the most fertile areas in the world. Manufacturing businesses have been attracted by the City’s relatively inexpensive electricity,¹ coupled with excellent access to transportation routes and facilities as well as a location that is central to the markets of the western United States. Today, tourism is a growing sector of the basic economy as well: visitors are attracted primarily by Lodi’s premium wine industry.

Local-serving activities—primarily retail trade, services of all types, and local government (including education)—complement the basic activities and comprise the major part of the Lodi economy.

In any discussion of economic activity, it is important to distinguish the businesses and jobs that are located in a region from the jobs held by residents of that region. Local jobs may be held by local residents or commuters from outside the community; conversely, employed local residents may work within the community or beyond. The following discussion first provides a framework for Lodi by providing information about the composition of the San Joaquin County economy. It then describes businesses and jobs in Lodi and the employment patterns of Lodi residents. It concludes with a discussion of employment projections for San Joaquin County and Lodi.

4.1 EMPLOYMENT IN SAN JOAQUIN COUNTY

The California Employment Development Department provides information about historical employment by industry in San Joaquin County. Overall, farm-based employment declined while nonfarm employment grew during the 15-year period between 1992 and 2007, and private sector employment grew more rapidly than government employment.

¹ The City owns the electric utility, and as a matter of policy has set rates low in comparison to the rates charged in other areas in order to create an advantage for businesses that are major energy users.

**Table 4.1-Ia. Historical Employment in San Joaquin County
(General Categories)**

	1992	1997	2002	2007	% Change, 1992- 2007
Total Wage and Salary	167,100	182,400	206,000	221,400	32%
Total Farm	15,100	18,000	15,900	12,200	-19%
Total Nonfarm	152,000	164,400	190,100	209,200	38%
Goods Producing ^a	28,500	29,100	32,900	37,000	30%
Service Providing ^a	123,500	135,300	157,200	172,200	39%
Private ^b	116,700	129,100	149,600	168,300	44%
Government ^b	35,300	35,300	40,500	40,900	16%

a Goods producing + service providing = total nonfarm.

b Private + government = total nonfarm

**Table 4.1-Ib. Historical Employment in San Joaquin County
(Nonfarm Industry Groups)**

	1992	2007	% of Total in 2007	Change, 1992-2007 Number	Percent
Total Wage and Salary	167,100	221,400	100%	54,300	32%
Total Nonfarm	152,000	209,200	94%	57,200	38%
Natural Resources and Mining	100	200	0%	100	100%
Construction	6,500	15,500	7%	9,000	138%
Manufacturing	21,900	21,300	10%	-600	-3%
Durable Goods	10,700	10,600	5%	-100	-1%
Nondurable Goods	11,200	10,700	5%	-500	-4%
Trade, Transportation and Utilities	31,900	50,300	23%	18,400	58%
Wholesale Trade	6,000	9,900	4%	3,900	65%
Retail Trade	19,000	26,900	12%	7,900	42%
Transp., Whs'g & Utilities	6,900	13,500	6%	6,600	96%
Information	2,300	2,500	1%	200	9%
Financial Activities	8,700	9,800	4%	1,100	13%
Professional and Business Ser- vices	10,200	18,500	8%	8,300	81%
Educational and Health Ser- vices	18,000	26,100	12%	8,100	45%
Leisure and Hospitality	12,000	17,700	8%	5,700	48%
Other Services	5,100	6,400	3%	1,300	25%
Government	35,300	40,900	18%	5,600	16%

Source: California Employment Development Department

Sectors that accounted for the greatest shares of total nonfarm employment in 2007 were government (18 percent), retail trade (12 percent), and education and health services (12 percent). No other sector provided as much as 10 percent of the county's nonfarm wage and salary jobs.

The sectors that gained the greatest numbers of jobs countywide during the 15-year period were construction (+9,000 jobs), professional and business services (+8,300 jobs), education and health services (+8,100 jobs), retail trade (+7,900 jobs), and transportation/warehousing/ utilities (+6,600 jobs). Leisure and hospitality (which includes arts/entertainment/recreation, accommodations, and food services/drinking places) and government also gained substantial numbers of employees (+5,700).

The only nonfarm industrial sector that lost employment during the 15-year period was manufacturing (-600 jobs, or about three percent of the total in 1992). This loss was shared by durable goods (which includes plastics, a significant contributor to Lodi's economy; -100 jobs, or one percent) and nondurable goods (which includes food processing, another significant contributor to Lodi's economy; -500 jobs, or about four percent).

4.2 BUSINESS CHARACTERISTICS

MAJOR BUSINESSES IN LODI

Lodi is home to seven of the 30 largest employers in San Joaquin County. Of these, two (the City of Lodi and the Lodi Unified School District) are in the public sector.

Table 4.2-1. Largest Employers

<i>Rank in Sj Co.</i>	<i>Employer</i>	<i>Sector</i>	<i>No of Employees</i>
3	Lodi Unified School District	Educational and health services	2,833
14	Lodi Memorial Hospital (hospital and physicians/surgeons)	Educational and health services	1,050
22	City of Lodi	Government	668
*	Cottage Bakery	Food manufacturing	650
24	General Mills	Manufacturing	608
26	Blue Shield of California	Finance and Insurance	560
27	Pacific Coast Producers	Food manufacturing	530

* Not ranked on the source web site.

Source: Rank, employer name, and number of employees from www.wrightrealtors.com/employers.htm; sector from Mundie & Associates

A more complete list of major employers in Lodi is provided by the City's web site. This list includes information about the type of business, but does not indicate the number of employees.

Table 4.2-2. Major Lodi Employers: Private Sector

<i>Company</i>	<i>Sector</i>
Food Manufacturing and Related Products	
Cottage Bakery	Food manufacturing: Breads, cookies, & cakes
General Mills, Inc.,	Food manufacturing: Cereal & food mixes
Miller Packing Company	Food manufacturing: Sausage & smoked meats
Pacific Coast Producers	Food manufacturing: Canning
Woodbridge-Robert Mondavi	Food manufacturing: Wine producer
Dart Container Company	Manufacturing: Nondurable goods: Styrofoam containers
Other Manufacturing	
CertainTeed Corporation	Manufacturing: Durable goods: Plastic pipe/fencing extrusion
Epic Plastics	Manufacturing: Durable goods: Benderboard & decking materials
Quashnick Tool Corporation	Manufacturing: Durable goods: Injection molding
Schaefer Systems International, Inc.	Manufacturing: Durable goods: Injection molding
Scientific Specialties Inc.	Manufacturing: Durable goods: Injection molding
Holz Rubber Co.	Manufacturing: Durable goods: Industrial rubber products
Kubota Tractors	Manufacturing: Durable Goods: Trailer packs/assembly & shipping*
LMI/All Country Glass	Manufacturing: Durable goods: Glass manufacturing
Lodi Iron Works	Manufacturing: Durable goods: Iron products
Lustre-Cal Nameplate Corp.	Manufacturing: Durable goods: Custom identification products manufacturing
Valley Industries	Manufacturing: Durable goods: Trailer hitch manufacturing
Other Major Employers	
Blue Shield of California	Finance and insurance: Insurance claims processing
Wine and Roses Inn & Spa	Leisure and hospitality: Destination hotel, restaurant, and spa

* This facility is a warehouse and distribution location.

Source: http://www.lodi.gov/eco_development/overview.html

County Business Patterns, published by the U.S. Department of Commerce, provides an extensive list of private businesses in Lodi.² This list shows that the greatest number of businesses in Lodi are in the retail sector, followed by construction businesses, health care and social assistance establishments (includes medical offices), and “other services” (except public administration). No other industry category accounts for more than 10 percent of all businesses, but accommodation and food services—with nearly nine percent—is also important.

Table 4.2-3. Number of Private Sector Employers in Lodi, by Industry

<i>Industry Code Description</i>	<i>Number of Establishments</i>	<i>Percent of Establishments</i>
Total	1,687	100%
Forestry, fishing, hunting, and agriculture	14	0.8%
Mining	2	0.1%
Utilities	1	0.1%
Construction	213	12.6%
Manufacturing	106	6.3%
Wholesale trade	66	3.9%
Retail trade	275	16.3%
Transportation & warehousing	47	2.8%
Information	20	1.2%
Finance & insurance	117	6.9%
Real estate & rental & leasing	84	5.0%
Professional, scientific & technical services	118	7.0%
Management of companies & enterprises	9	0.5%
Admin, support, waste mgt, remediation services	70	4.1%
Educational services	10	0.6%
Health care and social assistance	191	11.3%
Arts, entertainment & recreation	14	0.8%
Accommodation & food services	149	8.8%
Other services (except public administration	170	10.1%
Unclassified establishments	11	0.7%

Source: County Business Patterns, 2004, data for zip codes 95240, 95241, and 95242.

² County Business Patterns includes most private employers; it excludes data on self-employed individuals, employees of private households, railroad employees, agricultural production employees, and most government employees.

SIZES OF BUSINESS ESTABLISHMENTS (NUMBER OF EMPLOYEES)

According to County Business Patterns (2004), Lodi had at that time a total of 1,687 business establishments. Measured in terms of their numbers of employees, most of the businesses in Lodi are small: over half have one to four employees, and nearly three-quarters have fewer than 10 employees.

Table 4.2-4. Lodi Private Sector Employers by Size of Establishment

<i>Number of Employees</i>	<i>Number of Establishments</i>	<i>Percent of Establishments</i>
1-4	884	52.4%
5-9	363	21.5%
10-19	195	11.6%
20-49	161	9.5%
50-99	52	3.1%
100-249	22	1.3%
250-499	9	0.5%
500-999	1	0.1%
1,000 or more	0	0.0%
Total	1,687	100.0%

Source: County Business Patterns, 2004, data for zip codes 95240, 95241, and 95242.

BUSINESS LOCATION PATTERNS

County Business Patterns provides information by zip code. Lodi has three zip codes: 95240 (generally east of S. Ham Lane), 95242 (generally west of S. Ham Lane), and 95241 (for post office boxes only). Most businesses—nearly 70 percent of the total counted by County Business Patterns—are in zip code 95240. For this reason, it is not possible (based on this data source) to describe the locational patterns of the different business types.

In general, however, it is reasonable to say that industrial businesses (production and distribution) are located east of downtown, with the notable exception of General Mills, and that retail businesses are located downtown, along major arterials, and a few large notes (e.g., Lower Sacramento and Kettleman).

4.3 EMPLOYMENT CHARACTERISTICS

LABOR FORCE

Comprehensive information about the employment status of Lodi residents is available from the US Census.³ The data show that, in 2000, about 60 percent of Lodi residents 16 years old or older were in the labor force, and that nearly 57 percent were employed. The overall unemployment rate for the civilian labor force was 7.4 percent, slightly higher than the overall rate of 6.5 percent reported in the 1990 census, but both rates are considered within “acceptable” levels for a healthy economy.

Table 4.3-1. Employment Status of Lodi Residents 16 years and Older

	1990		2000	
	Number	%	Number	%
Total Population 16 years and over	40,119	100.0%	42,693	100.0%
In labor force	25,233	62.9%	26,125	61.2%
Civilian labor force	25,216	62.9%	26,111	61.2%
Employed	23,588	58.8%	24,177	56.6%
Unemployed	1,628	4.1%	1,934	4.5%
Percent of civilian labor force		6.5%		7.4%
Males 16 years and over	19,322	100.0%	20,447	100.0%
In labor force	14,626	75.7%	20,508	100.3%
Civilian labor force	14,609	75.6%	14,517	71.0%
Employed	13,724	71.0%	14,503	70.9%
Unemployed	885	4.6%	14	0.1%
Percent of civilian labor force		6.1%		0.1%
Females 16 years and over	20,797	100.0%	22,185	100.0%
In labor force	10,607	51.0%	11,608	52.3%
Civilian labor force	10,607	51.0%	11,608	52.3%
Employed	9,864	47.4%	10,672	48.1%
Unemployed	743	3.6%	936	4.2%
Percent of civilian labor force		7.0%		8.0%

Source: U.S. Census, 1990 and 2000

³ Census information is based on place of residence, and not place of work. Therefore, the characteristics of jobs in a place that is smaller than a county are not typically available. (The State of California publishes county-level information about wage and salary employment by place of work.)

The data further show that the unemployment rate for men in 2000 was virtually nil, while the unemployment rate for women was just over four percent.

EMPLOYMENT AND UNEMPLOYMENT

The California Employment Development Department provides information on employment and unemployment by year, but only for San Joaquin County as a whole. These data show that the unemployment rate in the county during the current decade has generally been lower than it was during the 1990s.

Table 4.3-2. Employment and Unemployment in San Joaquin County, 1990-2005

<i>Year</i>	<i>Employment</i>	<i>Unemployment</i>	<i>Unemployment Rate</i>
2005	264,000	21,900	7.6%
2004	258,600	24,400	8.6%
2003	255,300	25,500	9.1%
2002	251,100	24,200	8.8%
2001	246,500	19,700	7.4%
2000	241,000	18,000	6.9%
1999	228,100	22,200	8.9%
1998	221,000	26,200	10.6%
1997	218,000	26,500	10.8%
1996	213,100	27,400	11.4%
1995	210,700	29,500	12.3%
1994	209,400	30,800	12.8%
1993	207,700	34,400	14.2%
1992	205,500	34,000	14.2%
1991	203,300	27,900	12.1%
1990	204,600	22,600	9.9%

Source: California Employment Development Department.

INDUSTRY AND OCCUPATION OF EMPLOYED RESIDENTS

According to the 2000 Census, the greatest number of employed Lodi residents (more than 4,600, or nearly 20 percent) worked in the educational, health and social services sector. Other industry sectors that employed more than 10 percent of total workers were manufacturing and retail trade.

The distribution of employed Lodi residents among industries is generally similar to the distribution of all employed residents of San Joaquin County. Compared to the state, Lodi has noticeably greater proportions of workers in agriculture and construction, and a noticeably smaller proportion in professional, scientific, management, administrative, and waste management services.⁴

Table 4.3-3. Industry of Employed Lodi Residents, 2000

<i>Industry</i>	<i>Lodi</i>		<i>San Joaquin Co.</i>	<i>California</i>
	<i>Number</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
Agriculture, forestry, fishing and hunting, and mining	1,239	5.1%	5.4%	1.9%
Construction	2,052	8.5%	7.4%	6.2%
Manufacturing	3,209	13.3%	12.2%	13.1%
Wholesale trade	1,172	4.8%	4.9%	4.1%
Retail trade	2,966	12.3%	11.7%	11.2%
Transportation and warehousing, and utilities	1,273	5.3%	6.2%	4.7%
Information	505	2.1%	2.5%	3.9%
Finance, insurance, real estate, and rental and leasing	1,565	6.5%	5.9%	6.9%
Professional, scientific, mgmt., administrative, and waste mgmt. services	1,707	7.1%	7.7%	11.6%
Educational, health and social services	4,646	19.2%	19.2%	18.5%
Arts, entertainment, recreation, accommodation and food services	1,648	6.8%	6.8%	8.2%
Other services (except public administration)	1,055	4.4%	4.6%	5.2%
Public administration	1,140	4.7%	5.3%	4.5%
Total	24,177	100.0%	100.0%	100.0%

Source: U.S. Census, 2000

⁴ The term “noticeably different” is used here to indicate a difference of at least two percent.

More than half of employed Lodi residents worked in offices or stores; nearly 6,700 were in management, professional, and related occupations, and another 6,200 worked in sales and office occupations.

The occupational distribution of employed Lodi residents was similar to that of workers living throughout San Joaquin County, with slightly fewer Lodi residents working in sales and office occupations. Compared to the state, Lodi had a noticeably smaller proportion of employed residents working in management, professional, and related occupations, and noticeably greater proportions working in farming, fishing, and forestry occupations; construction, extraction, and maintenance occupations; and production, transportation, and material moving occupations.

Table 4.3-4. Occupation of Employed Lodi Residents, 2000

Occupation	Lodi		San Joaquin Co.	California
	Number	Percent	Percent	Percent
Management, professional, and related occupations	6,673	27.6%	27.1%	36.0%
Service occupations	3,583	14.8%	14.6%	14.8%
Sales and office occupations	6,245	25.8%	27.1%	26.8%
Farming, fishing, and forestry occupations	1,019	4.2%	4.1%	1.3%
Construction, extraction, and maintenance occupations	2,547	10.5%	10.2%	8.4%
Production, transportation, and material moving occupations	4,110	17.0%	16.8%	12.7%
Total	24,177	100.0%	100.0%	100.0%

Source: U.S. Census, 2000

NUMBER OF JOBS IN LODI

The number of jobs in Lodi, by sector, is available by request from the California Employment Development Department. Table 4.3-5 and Figure 4.3-1 indicate that the greatest numbers of jobs are in retail trade, agriculture/forestry/fishing and hunting, and health care/social assistance. Together, these three sectors account for more than one-third of Lodi jobs.

Sectors that added the greatest numbers of jobs between 2001 and 2006 were local government (+505 jobs), accommodation and food services (+477 jobs), and retail trade (+428 jobs). Health care/social assistance and professional/scientific/technical jobs grew by substantial amounts (+390 jobs and +336 jobs, respectively).

Sectors that lost the greatest numbers of jobs during the five-year period were durable goods manufacturing (-565 jobs) and management of companies and enterprises (-380 jobs; included in "all other industries" in Table 4.3-5 and Figure 4.3-1).

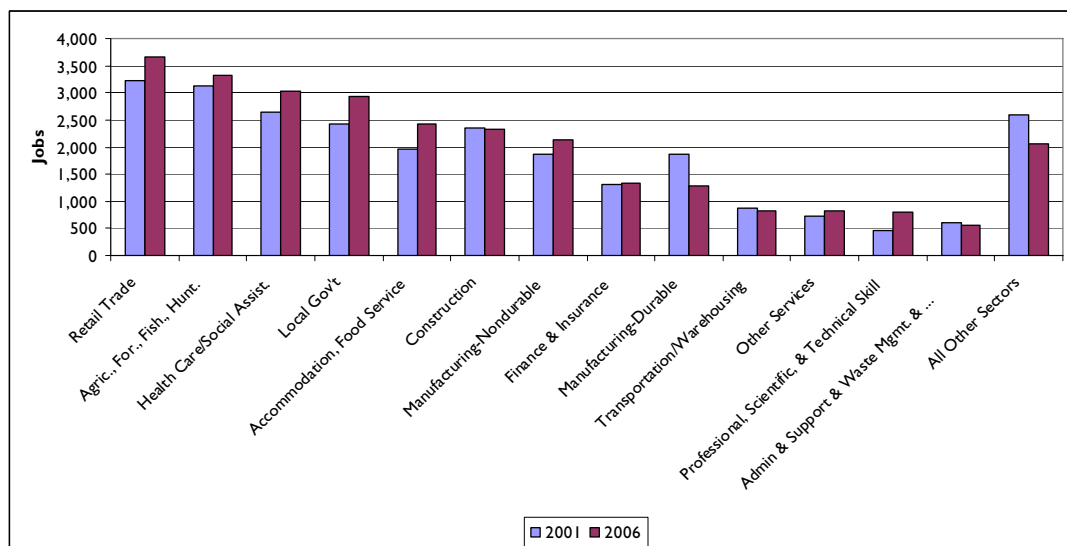
Table 4.3-5. Lodi Jobs by Sector, 2001 and 2006

	2001		2006		Change, 2001-2006	
	Number	Pct.	Number	Pct.	Number	Pct.
Retail Trade	3,234	12.4%	3,662	13.3%	428	13.2%
Agriculture, Forestry, Fishing & Hunting	3,121	12.0%	3,321	12.1%	200	6.4%
Health Care & Social Assistance	2,644	10.2%	3,034	11.0%	390	14.8%
Local Government	2,434	9.4%	2,939	10.7%	505	20.7%
Accommodation & Food Services	1,952	7.5%	2,429	8.8%	477	24.4%
Construction	2,350	9.0%	2,332	8.5%	-18	-0.8%
Manufacturing-Nondurable	1,877	7.2%	2,141	7.8%	264	14.1%
Finance & Insurance	1,301	5.0%	1,338	4.9%	37	2.8%
Manufacturing-Durable	1,859	7.1%	1,294	4.7%	-565	-30.4%
Transportation & Warehousing	876	3.4%	831	3.0%	-45	-5.1%
Other Services	719	2.8%	813	3.0%	94	13.1%
Professional, Scientific, & Technical Skill	455	1.7%	791	2.9%	336	73.8%
Admin & Support & Waste Mgmt & Remediation	603	2.3%	554	2.0%	-49	-8.1%
All Other Sectors	2,595	10.0%	2,065	7.5%	-530	-20.4%
		100.0		100.0		
Total	26,020	%	27,544	%	1,524	5.9%

Note: Data for the fourth quarter of 2006 are preliminary; therefore, annual figures for 2006 are subject to change.

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment and Wages

Figure 4.3-1. Lodi Jobs by Sector, 2001 and 2006



I. Note: Data for the fourth quarter of 2006 are preliminary; therefore, annual figures for 2006 are subject to change.

Source: California Employment Development Department, Labor Market Information Division, Quarterly Census of Employment

TYPICAL WAGES

The California Employment Development Department provides information about wage levels in various occupations. In general, the average annual wage in San Joaquin County is lower than the average annual wage statewide. The exceptions are (1) education, training, and library occupations, (2) protective service occupations, (3) building and grounds cleaning and maintenance occupations, (4) production occupations, and (5) transportation and materials moving occupations.

Table 4.3-6. Mean Annual Wage by Occupational Group, San Joaquin County and California, First Quarter of 2006

<i>Occ Code</i>	<i>Occupation</i>	<i>San Joaquin Co.</i>	<i>California</i>
	Total, All Occupations	\$37,229	\$43,429
110000	Management Occupations	87,315	100,772
130000	Business and Financial Operations Occupations	54,163	63,752
150000	Computer and Mathematical Occupations	57,163	77,406
170000	Architecture and Engineering Occupations	60,331	75,842
190000	Life, Physical, and Social Science Occupations	48,468	64,782
210000	Community and Social Services Occupations	41,887	43,930
230000	Legal Occupations	70,988	97,269
250000	Education, Training, and Library Occupations	51,789	50,720
270000	Arts, Design, Entertainment, Sports, and Media Occupations	38,833	50,160
290000	Healthcare Practitioners and Technical Occupations	66,928	71,172
310000	Healthcare Support Occupations	24,751	27,496
330000	Protective Service Occupations	45,489	43,739
350000	Food Preparation and Serving Related Occupations	18,765	19,411
370000	Building & Grounds Cleaning & Maintenance Occupations	25,866	24,548
390000	Personal Care and Service Occupations	21,915	24,840
410000	Sales and Related Occupations	30,623	36,967
430000	Office and Administrative Support Occupations	31,178	33,254
450000	Farming, Fishing, and Forestry Occupations	18,069	18,976
470000	Construction and Extraction Occupations	41,255	44,375
490000	Installation, Maintenance, and Repair Occupations	40,735	42,362
510000	Production Occupations	30,989	29,355
530000	Transportation and Material Moving Occupations	30,634	29,228

Source: California Employment Development Department, Occupational Employment Statistics Survey, 2006

JOURNEY TO WORK

According to the 2000 U.S. Census, one-half of the workers employed in Lodi also lived in Lodi. Nearly one-fifth lived in Stockton. All together, nearly three-quarters of Lodi workers lived in San Joaquin County. Approximately six percent of Lodi workers lived in Sacramento County.

Table 4.3-7a. Journey to Work: Place of Residence for Workers Employed in Lodi, 2000

<i>Place of Residence of Lodi Workers</i>	<i>Number</i>	<i>Percent</i>
San Joaquin Co.		
Lodi city	10,630	49.6%
Stockton and vicinity*	4,165	19.4%
South Woodbridge CDP	365	1.7%
Manteca city	220	1.0%
Lockeford CDP	200	0.9%
Tracy	100	0.5%
Subtotal: San Joaquin Co.	15,680	73.1%
Sacramento County		
Galt city	870	4.1%
Sacramento city	140	0.7%
Elk Grove CDP	130	0.6%
Garden Acres CDP	120	0.6%
Subtotal: Sacramento County	1,260	5.9%
Stanislaus		
Modesto city	220	1.0%
All other places	4,293	20.0%
Total	21,453	100.0%

* Includes Morada CDP (census designated place), August CDP, and Country Club CDP.

Source: U.S. Census, 2000

Table 4.3-7b. Journey to Work: Place of Residence for Workers Employed in Lodi, 1990 and 2000

	<i>1990</i>	<i>2000</i>
San Joaquin Co.	88.3%	73.1%
Lodi	55.5%	49.6%
Stockton & vicinity	13.8%	19.4%
Other locations	19.0%	4.1%
Sacramento County	7.5%	5.9%
Elsewhere	4.3%	21.0%
Total	100.0%	100.0%

Source: U.S. Census, 1990 and 2000

Slightly fewer than half of employed Lodi residents—about 45 percent—worked in Lodi. (Of those, 622, or nearly six percent of those who worked in Lodi, worked at home.) About 20 percent worked in Stockton, five percent in Sacramento County locations, and one percent in Alameda County.

Table 4.3-8a. Journey to Work: Place of Work for Employed Lodi Residents, 2000

<i>Place of Work of Employed Lodi Residents</i>	<i>Number</i>	<i>Percent</i>
San Joaquin Co.		
Lodi city	10,630	44.8%
Stockton and vicinity*	5,255	22.2%
Tracy city	255	1.1%
Manteca city	220	0.9%
French Camp CDP	175	0.7%
Lathrop city	160	0.7%
Lockeford CDP	95	0.4%
South Woodbridge CDP	70	0.3%
Subtotal	16,860	71.1%
Sacramento County		
Sacramento city	620	2.6%
Galt city	305	1.3%
Arden-Arcade CDP	75	0.3%
Elk Grove CDP	70	0.3%
Rancho Cordova CDP	70	0.3%
Carmichael CDP	45	0.2%
Subtotal	1,185	5.0%
Alameda County		
Livermore city	90	0.4%
Oakland city	90	0.4%
Hayward city	50	0.2%
Subtotal	230	1.0%
Modesto city	160	0.7%
West Sacramento city	60	0.3%
San Jose city	45	0.2%
Los Angeles city	45	0.2%
All other places	5,118	21.6%
Total	23,703	10.0%

* Includes Garden Acres CDP (census designated place), August CDP, Kennedy CDP, and Lincoln Village CDP.

Source: U.S. Census, 2000

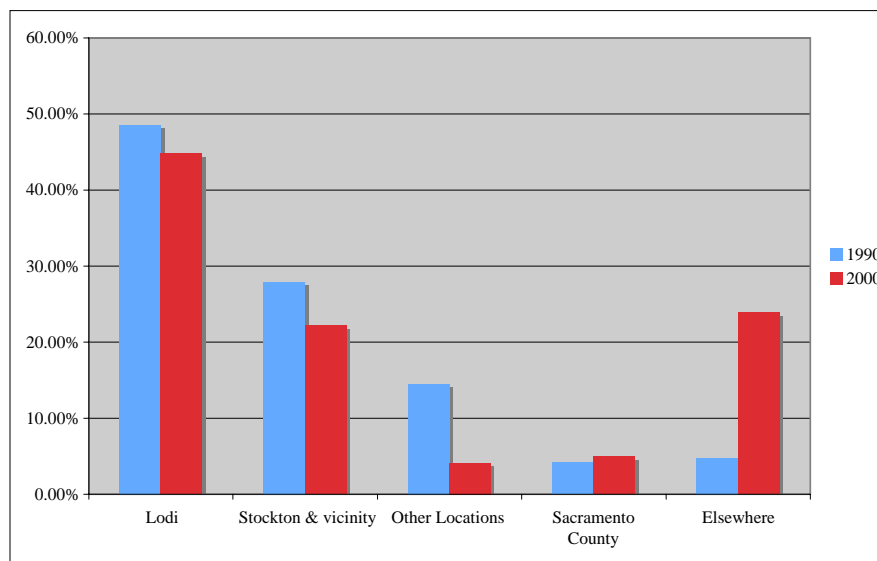
More and more Lodi residents are working outside San Joaquin County. According to the U.S. Census information, the proportion of residents commuting to places of work outside the county increased by nearly 20 percent between 1990 and 2000. The proportion of residents working outside of San Joaquin and Sacramento counties climbed from 4.8 percent in 1990 to 23.9 percent in 2000 (Figure 4.3-2).

Table 4.3-8b. Journey to Work: Place of Work for Employed Lodi Residents, 1990 and 2000

	1990	2000
San Joaquin Co.	90.9%	71.1%
Lodi	48.5%	44.8%
Stockton & vicinity	27.9%	22.2%
Other Locations	14.5%	4.1%
Sacramento County	4.2%	5.0%
Elsewhere	4.8%	23.9%
Total	100.0%	100.0%

Source: U.S. Census, 1990 and 2000

Figure 4.3-2. Work Location of Lodi Residents, 1990 and 2000



JOBS/HOUSING BALANCE

In 2000, Lodi had about 21,450 jobs and 20,692 households, or just over one job per household.

The concept of jobs/housing balance is intended to provide information about whether a community is providing sufficient housing for the people employed in that community, and a sufficient number of jobs for the people who live there and are seeking employment. In today's economy, many households have more than one worker. Therefore, jobs/housing balance is typically expressed as jobs per employed resident.

Lodi had slightly fewer jobs (21,450) than employed residents (24,177) in 2000, resulting in a ratio of jobs per employed resident of about 0.9:1. In other words, Lodi did not have quite enough jobs for all the working people who lived there, even if the match between jobs skills required and job skills offered had been perfect.

Table 4.3-9a. Jobs/Housing Balance, Lodi, 2000

Jobs in Lodi (from U.S. Census, Journey to Work))	21,453
Households in Lodi (from U.S. Census, Data Profile 1)	20,692
Jobs/household	1.04
Employed residents (from U.S. Census, Data Profile 3)	24,177
Jobs/employed resident	0.89
Employed residents/household	1.17

Source: U.S. Census, 2000

The jobs/housing balance in other San Joaquin County cities varied widely in 2000. Stockton was balanced—1.0 jobs per employed resident—which means that the number of people who lived in Stockton and commuted to work elsewhere was approximately the same as the number who lived elsewhere and commuted to work in Stockton. Lathrop also had approximate balance, with 1.04 jobs per employed resident. Tracy had 3.8 jobs per employed resident, indicating that it was an employment center, while Manteca had only 0.6 jobs per employed resident, indicating that it is a bedroom community.

Table 4.3-9b. Jobs/Housing Balance, San Joaquin County Cities, 2000

	<i>Lodi</i>	<i>Stockton</i>	<i>Tracy</i>	<i>Manteca</i>	<i>Lathrop</i>
Jobs	21,453	88,848	16,338	11,879	4,469
Households	20,692	78,556	17,620	16,368	2,908
Jobs/HH	1.04	1.13	0.93	0.73	1.54
Employed Residents	24,177	89,165	4,291	20,561	4,291
Jobs/Employed Resident	0.89	1.00	3.81	0.58	1.04
Employed residents/HH	1.17	1.14	0.24	1.26	1.48

Source: U.S. Census, 2000

EMPLOYMENT PROJECTIONS

SJCOG anticipates that the number of jobs in Lodi will grow from 23,438 in 2005 to 33,686 in 2030.

SJCOG's projections anticipate that Lodi's employment will grow slightly faster than countywide employment, increasing the City's share of total jobs from 11.0 percent in 2000 to 11.6 percent in 2030.

Table 4.3-10. Projected Employment Growth: Lodi and San Joaquin County

<i>Area</i>	<i>2000</i>	<i>2005</i>	<i>2010</i>	<i>2015</i>	<i>2020</i>	<i>2025</i>	<i>2030</i>
<i>Employment</i>							
Lodi	21,450	23,438	25,466	27,457	29,449	31,597	33,686
San Joaquin Co.	195,710	207,397	220,000	234,343	250,624	270,406	289,461
<i>Average annual % change from previous date</i>							
Lodi		1.8%	1.7%	1.5%	1.4%	1.4%	1.3%
San Joaquin Co.		1.2%	1.2%	1.3%	1.4%	1.5%	1.4%
<i>Average annual absolute change from previous date</i>							
Lodi		398	406	398	398	430	418
San Joaquin Co.		2,337	2,521	2,869	3,256	3,956	3,811
<i>Lodi as % of San Joaquin Co.</i>							
	11.0%	11.3%	11.6%	11.7%	11.8%	11.7%	11.6%

Source: SJCOG Projections (from Lesley Miller, e-mail to M&A, 1-2-07)

No specific projections are available to describe the economic sectors/activities in which growth is expected to occur over that period of time. Countywide projections prepared by the California Employment Development Department (EDD) are not appropriately applied to specific subareas such as Lodi, because the comparative locational advantages/disadvantages of the various cities within San Joaquin County are too great to allow an assumption that employment growth by industry will be uniformly distributed throughout the County. Lodi's strengths—location along US 99, size, agricultural ambiance, relatively inexpensive electrical power, strong community identity and inviting community character, vital downtown—will be attractive to different kinds of businesses from those that would find greater benefit in (for example) Tracy's proximity to the Bay Area and I-5 or Stockton's larger size, status as the County seat, and presence of a nationally-recognized university. At the same time, industries that have historically formed the core of Lodi's economic base—primarily manufacturing—are not expected to grow or have been declining in San Joaquin County or in California as a whole, because (1) productivity is increasing, which limits the need for new workers; (2) increased reliance on machines (including computers) reduces the need for additional workers; (3) the costs of production—including both labor and input materials—are high relative to costs in other areas (including abroad); and (4) some resources, such as water, are relatively scarce.⁵ These factors apply to manufacturing of both durable and nondurable goods.

As manufacturing in California declines, the nature of economic activity is evolving. Lodi's capture of the (expanded/relocated) Blue Cross call center is unusual, in that it retains call center jobs in the United States, but not unique. More and more of the U.S. economy is concentrated in information- and service-based activities. These activities require different types of land and building space than did the more traditional goods-producing activities, and this evolution of demand for land and building space has implications for Lodi as it plans for the future.

For purposes of the General Plan, therefore, it is reasonable to expect that employment growth may be categorized as follows:

- Jobs that occupy commercial space, which may include retail stores, restaurants, and personal service establishments.
- Jobs that occupy business park space, which may include offices, light assembly and distribution space, and “flex space” (part office and part warehouse or production).

⁵ Information in this sentence based on an interview with Liz Baker, California Employment Development Department specialist for San Joaquin County, June, 2007.

- Jobs that occupy clearly industrial space; for example, food processors (such as General Mills) and plastics fabricators.

With specific respect to jobs based in wineries: The County of Napa has considered carefully the issue of where new wineries should be located. On the one hand, a natural location—one that is also advantageous for the winemaker—may be a site in or adjacent to the vineyard. On the other hand, such locations result in a loss of land available for grapevines, and it is not inappropriate to produce wine in a business park location. With this background, Lodi could evaluate alternative appropriate locations for wineries as it proceeds with the General Plan.

4.4 RETAIL SALES

CITYWIDE TRENDS

The number of retail outlets in Lodi has increased during the past decade. Further, the number of outlets per capita has increased.

Table 4.4-1. Trends in Retail Sales: Number of Sales Permits

	Permits		
	1995	2000	2005
Apparel	23	31	30
General Merchandise	22	24	24
Food Stores	45	56	63
Eating/Drinking Places	144	153	180
Home Furnishings/Appliances	46	53	68
Bldg. Materials/Farm Implements	29	23	24
Auto Dealers/Auto Supplies	62	81	90
Service Stations	20	16	17
Other Retail Stores	208	268	377
Retail Stores Total	599	705	873
All Other Outlets	912	869	906
Total All Outlets	1,511	1,574	1,779

Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 1995, 2000, and 2005

Table 4.4-2. Trends in Retail Sales: Number of Sales Permits per Capita

	<i>Permits (per 1,000 residents)</i>		
	<i>1995</i>	<i>2000</i>	<i>2005</i>
Apparel	0.4	0.5	0.5
General Merchandise	0.4	0.4	0.4
Food Stores	0.8	1.0	1.0
Eating/Drinking Places	2.7	2.7	2.9
Home Furnishings/Appliances	0.9	0.9	1.1
Bldg. Materials/Farm Implements	0.5	0.4	0.4
Auto Dealers/Auto Supplies	1.2	1.4	1.4
Service Stations	0.4	0.3	0.3
Other Retail Stores	3.9	4.7	6.0
Retail Stores Total	11.2	12.4	13.9
All Other Outlets	17.0	15.2	14.5
Total All Outlets	28.2	27.6	28.4

Source: State Board of Equalization, Taxable Sales in California (Sales and Use Tax), 1995, 2000, and 2005

While the number of retail outlets in Lodi increased, so did the value of taxable sales. Even when adjusted for population growth and inflation, retail sales in most store categories increased during the decade. These figures suggest that the existing/evolving retail offerings continue to appeal to Lodi residents and/or visitors.

Table 4.4-3. Trends in Retail Sales: Taxable Transactions in Lodi (\$000s of Nominal Dollars)

	1995	2000	2005
Apparel	\$5,970	\$4,702	\$11,470
General Merchandise	92,715	132,747	150,767
Food Stores	33,237	42,600	59,615
Eating/Drinking Places	43,770	52,952	78,756
Home Furnishings/Appliances	12,396	18,055	18,457
Bldg. Materials/Farm Implements	31,801	45,722	92,242
Auto Dealers/Auto Supplies	103,241	137,830	203,707
Service Stations	34,348	45,675	51,171
Other Retail Stores	34,925	49,862	63,874
Retail Stores Total	\$392,403	\$530,145	\$730,059
All Other Outlets	94,440	153,314	159,768
Total All Outlets	\$486,843	\$683,459	\$889,827

Source: State Board of Equalization, Taxable Sales in California (Sales and Use Tax), 1995, 2000, and 2005

Table 4.4-4. Trends in Retail Sales: Taxable Transactions per Capita in Lodi (Nominal Dollars)

	1995	2000	2005
Apparel	\$111.43	\$82.48	\$183.13
General Merchandise	1,730.56	2,328.45	2,407.19
Food Stores	620.38	747.22	951.83
Eating/Drinking Places	816.99	928.80	1,257.44
Home Furnishings/Appliances	231.38	316.69	294.69
Bldg. Materials/Farm Implements	593.58	801.99	1,472.76
Auto Dealers/Auto Supplies	1,927.04	2,417.60	3,252.44
Service Stations	641.12	801.16	817.01
Other Retail Stores	651.89	874.60	1,019.83
Retail Stores Total	\$7,324.37	\$9,298.99	\$11,656.33
All Other Outlets	1,762.76	2,689.20	2,550.90
Total All Outlets	\$9,087.13	\$11,988.20	\$14,207.23

Source: State Board of Equalization, Taxable Sales in California (Sales and Use Tax), 1995, 2000, and 2005; Mundie & Associates (population estimates from California Department of Finance)

**Table 4.4-5. Trends in Retail Sales: Taxable Transactions per Capita in Lodi
(Constant 2005 Dollars)**

	1995	2000	2005
Apparel	\$148.99	\$92.77	\$183.13
General Merchandise	2,313.89	2,619.18	2,407.19
Food Stores	829.50	840.52	951.83
Eating/Drinking Places	1,092.37	1,044.77	1,257.44
Home Furnishings/Appliances	309.37	356.24	294.69
Bldg. Materials/Farm Implements	793.66	902.12	1,472.76
Auto Dealers/Auto Supplies	2,576.59	2,719.47	3,252.44
Service Stations	857.22	901.20	817.01
Other Retail Stores	871.62	983.81	1,019.83
Retail Stores Total	\$9,793.20	\$10,460.08	\$11,656.33

Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 1995, 2000, and 2005; Mundie & Associates (population estimates from California Department of Finance; consumer price index adjustment factors from U.S. Department of Labor, Bureau of Labor Statistics))

One final look at these sales data considers transactions per sales permit (“outlet”). It shows that, overall, average sales per retail store declined (in constant dollars) between 1995 and 2005, although most store categories posted gains over the 10-year period (some with declines in 2000). Only food stores, home furnishings/appliances stores, and “other retail stores” (that is, primarily specialty stores) showed overall declines between 1995 and 2005. All three of these categories added outlets relative to population (that is, the number of outlets per capita increased; see Table 4.4-6) during this period, with the most substantial increase in the “other retail stores” group.

**Table 4.4-6. Trends in Retail Sales: Taxable Transactions per Outlet in Lodi
(Thousands of Constant 2005 Dollars)**

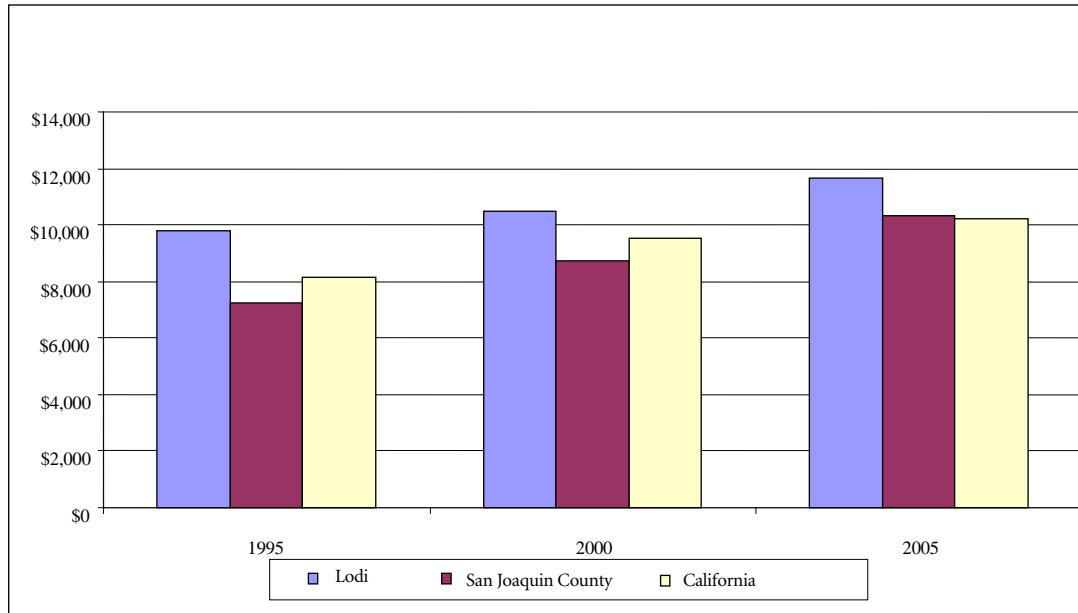
	1995	2000	2005
Apparel	\$347	\$171	\$382
General Merchandise	5,635	6,222	6,282
Food Stores	988	856	946
Eating/Drinking Places	406	389	438
Home Furnishings/Appliances	360	383	271
Bldg. Materials/Farm Implements	1,466	2,236	3,843
Auto Dealers/Auto Supplies	2,226	1,914	2,263
Service Stations	2,296	3,211	3,010
Other Retail Stores	225	209	169
Retail Stores Total	\$876	\$846	\$836

Source: State Board of Equalization, Taxable Sales in California (Sales and Use Tax), 1995, 2000, and 2005; Mundie & Associates (population estimates from California Department of Finance; consumer price index adjustment factors from U.S. Department of Labor, Bureau of Labor Statistics))

COMPARATIVE TRENDS

Comparisons of Lodi's taxable retail sales per capita to those in larger areas—e.g., San Joaquin County as a whole and the State of California—provide an indication of areas of relative strength (or weakness) in the local retail sales profile.

Lodi's retail performance, as measured by sales per capita in constant dollars, has been stronger than those of the county and the state in each of the three indicator years (1995, 2000, and 2005), as shown in Figure 4.4-2. Lodi captured higher sales per capita than the county and state in most categories in all three years shown. At the same time, its performance relative to the county and state declined between 1995 and 2005.

Figure 4.4-I. Retail Sales per Capita, Constant Dollars

Source: Table 39.

Table 4.4-7. Trends in Retail Sales: Taxable Transactions per Capita in Lodi as a Percent of Taxable Transactions per Capita in San Joaquin County and California

	<i>Lodi as % of San Joaquin Co.</i>			<i>Lodi as % of CA</i>		
	<i>1995</i>	<i>2000</i>	<i>2005</i>	<i>1995</i>	<i>2000</i>	<i>2005</i>
Apparel	65%	39%	59%	34%	22%	36%
General Merchandise	172%	170%	150%	162%	172%	156%
Food Stores	134%	125%	147%	137%	138%	165%
Eating/Drinking Places	139%	130%	142%	102%	89%	100%
Home Furnishings/Appliances	118%	138%	107%	75%	79%	62%
Bldg. Materials/Farm Implements	101%	94%	94%	125%	110%	136%
Auto Dealers/Auto Supplies	172%	140%	152%	184%	144%	162%
Service Stations	120%	90%	63%	120%	108%	78%
Other Retail Stores	86%	73%	65%	60%	55%	59%
Retail Stores Total	135%	119%	113%	120%	110%	114%

Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 1995, 2000, and 2005.

Although the trend among categories is irregular, it is noteworthy that Lodi's performance weakened relative to both the county and the state in six of the ten categories, including its two sectors with the highest sales: general merchandise and auto dealers/auto supplies.

Therefore, continued attention to the retail sector is required. The City's sales tax consultant, HdL Companies, has provided information based on comparisons of Lodi's sales tax receipts to those of seven other cities. In sum, HdL's information supports the following conclusions:

- Lodi's taxable retail sales in the top 25 business types declined by 3.5 percent between the third quarter of 2005 and the third quarter of 2006. For comparison, taxable sales in San Joaquin County declined by 5.0 percent while statewide sales tracked by HdL increased by 0.8 percent. Note that these comparisons are based on total sales and not on sales per capita.
- Lodi has the second-highest per capita sales tax receipts of the seven cities included in the comparison table for total sales tax revenues per capita. (The comparison cities are Stockton, Manteca, Tracy, Modesto, Elk Grove, and Fairfield). Fairfield, which is home to the Solano Mall and extensive satellite retail development, has the highest sales per capita. Tracy has attracted a substantial amount of "off-price" retailing; that is, regional centers that offer factory outlets, big box "category killers," and similar stores.
- Lodi has the second lowest auto sales/leases revenues of the seven cities included in the comparison table for auto sales & leases. (The comparison cities are Stockton, Manteca, Elk Grove, Fairfield, Tracy, and Folsom.) Lodi outperforms only Manteca in this category. Stockton and Fairfield are the top performers in this group, tracking each other closely.

Table 4.4-8. Changes in Taxable Sales in Lodi and California, 3Q 2005-3Q 2006

<i>Lodi Outperformed State (Larger % Increase or Smaller % Decrease)</i>	<i>State Outperformed Lodi (Larger % Increase or Smaller % Decrease)</i>
New motor vehicle dealers	Discount department stores
Restaurants no alcohol	Service stations
Heavy industrial	Lumber/building materials
Specialty stores	Contractors
Light industrial/printers	Grocery stores liquor
Family apparel	Petroleum products/equipment
Office supplies/furniture	Automotive supply stores
Boats/motorcycles	Restaurants beer and wine
	Restaurants liquor
	Department stores
	Electronics/appliance stores
	Package liquor stores
	Used automotive dealers
	Drug stores
	Repair shop/hand tool rentals
	Home furnishings
	Hardware stores
	All others

Source: The HdL Companies, City of Lodi, Sales Tax Update, Q3 2006

Table 4.4-9. Taxable Sales per Capita in Lodi and Selected Comparison Cities, 2005

	<i>Taxable Sales per Capita</i>		
	<i>Total</i>	<i>Retail Stores</i>	<i>Auto Dealers/Supplies</i>
Lodi	\$14,165	\$11,622	\$3,243
State	14,444	10,110	3,018
73 Cities with Populations 60,000-100,000	15,640	12,660	2,784
Stockton	13,077	10,656	2,316
Fairfield	15,420	12,935	3,027
Elk Grove	13,284	11,707	4,092
Tracy	14,478	12,694	3,424
Other cities in San Joaquin Co.	15,472	9,753	n.a.
Wine tourism cities	20,453	16,466	4,991

<i>Lodi as % of:</i>	<i>Taxable Sales per Capita</i>		
	<i>Total</i>	<i>Retail Stores</i>	<i>Auto Dealers/Supplies</i>
State	98%	115%	107%
Cities of 60,000-100,000	91%	92%	117%
Stockton	108%	109%	140%
Fairfield	92%	90%	107%
Elk Grove	107%	99%	79%
Tracy	98%	92%	95%
Other cities in San Joaquin Co.	92%	119%	n.a.
Wine tourism cities	69%	71%	65%

Note: Comparison cities are listed in Attachment A.

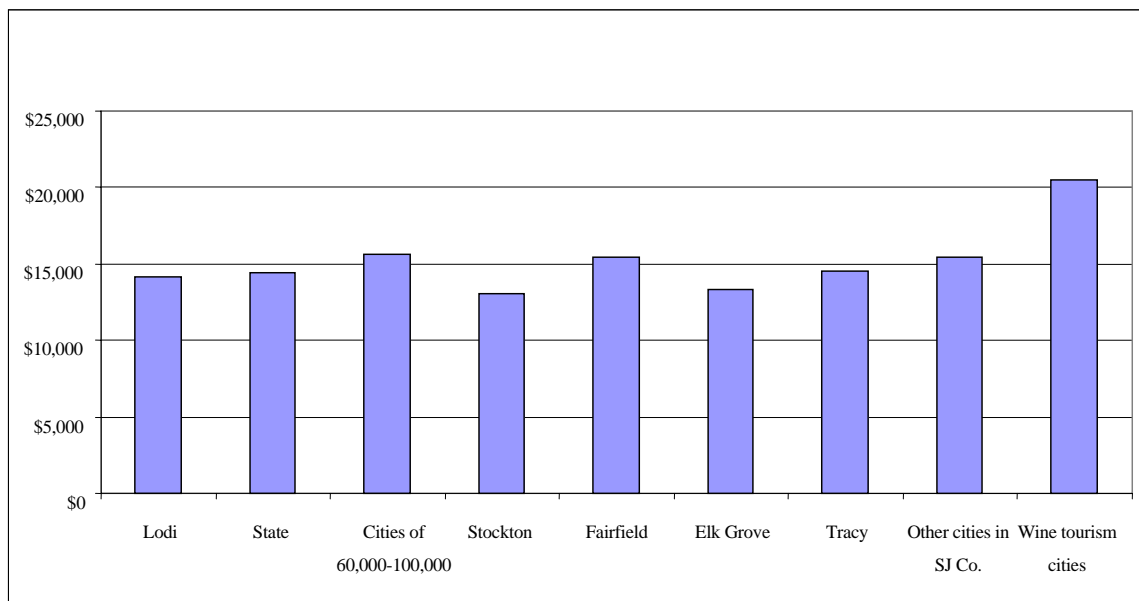
Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 2005

Further comparisons of Lodi to all California cities with populations between 60,000 and 100,000, plus a selection of other cities,⁶ indicate the following:

- Compared to the state as a whole, Lodi captures slightly less revenue (-2%) in total taxable sales per capita, somewhat more (+15%) in taxable sales in retail outlets, and slightly more (+7%) in auto sales.
- Compared to Stockton, Lodi captures more retail revenue per capita in total, in retail outlets, and in auto sales.
- Compared to Fairfield, Lodi does not do as well in total or in retail outlets, but does better in auto sales.
- Compared to Elk Grove, Lodi does better in total sales per capita, about the same in retail stores, but somewhat worse in auto sales.
- Compared to Tracy, Lodi does not do quite as well in any of the three categories.
- Compared to the other cities in San Joaquin County (Escalon, Lathrop, and Ripon), which are smaller, Lodi captures somewhat less revenue (-8%) in total taxable sales per capita and somewhat more revenue (+19%) in sales at retail outlets. There are too few auto dealers in the other cities for those sales results to be reported separately.
- Compared to the other wine tourism cities (Petaluma, Paso Robles, Healdsburg, and Sonoma), Lodi lags in all three categories.
- Compared to all other cities with populations between 60,000 and 100,000, Lodi's sales in apparel stores are lower by about \$540 per capita, and sales in "other retail stores" (primarily specialty stores) are lower by about \$895 per capita. It is likely that some of this difference is captured by large general merchandise stores, such as Wal-Mart; it is also likely that there is room for improvement in Lodi's performance in these categories.

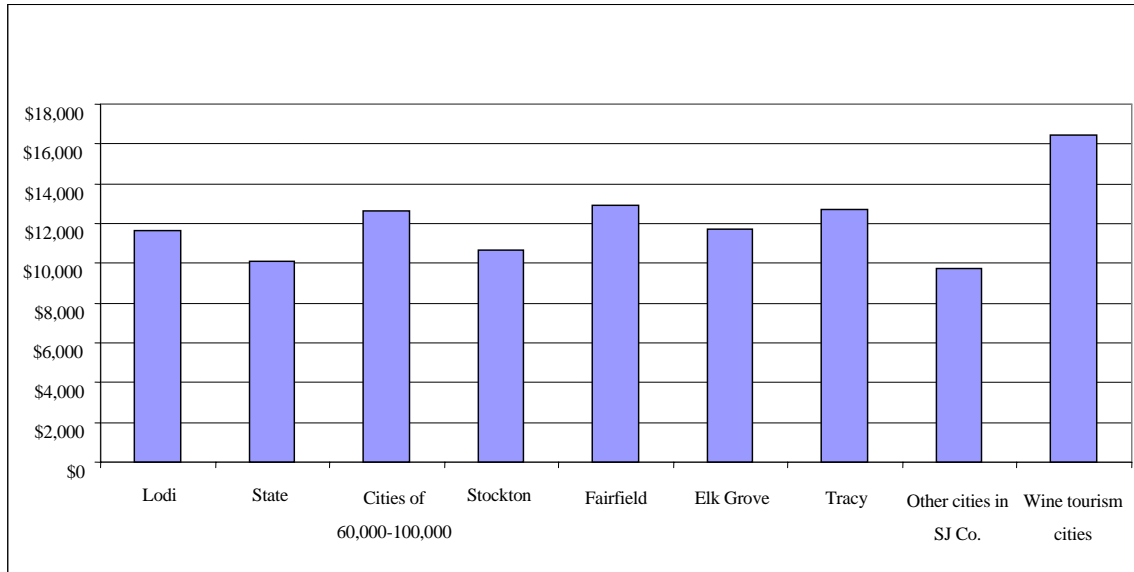
⁶ These other cities, which are considered to be of particular relevance to Lodi, include the cities within San Joaquin County as well as Fairfield, Elk Grove, Healdsburg, Paso Robles, Petaluma, and Sonoma. Fairfield and Elk Grove are included because they are among HdL's comparison cities. The latter four cities are known as destinations for wine tasting and related activities. (Calistoga, St. Helena, and Yountville were excluded from this analysis because they are too small for any comparisons to be meaningful; Napa is within the targeted size range of 60,000 to 100,000 residents.)

Figure 4.4-2. Total Taxable Sales per Capita



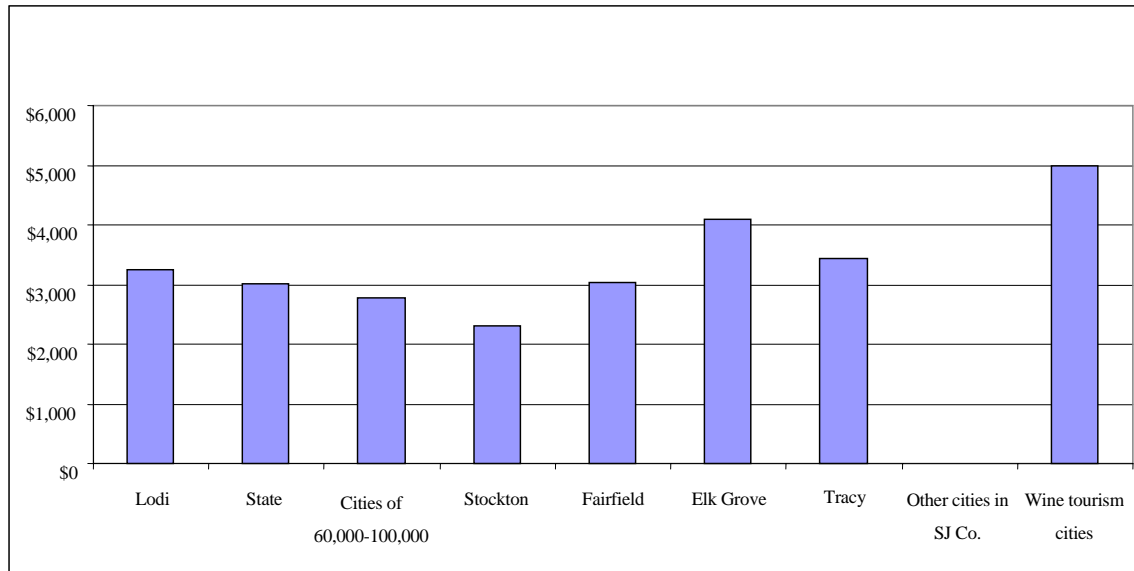
Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 2005

Figure 4.4-3. Taxable Sales per Capita in Retail Stores



Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 2005

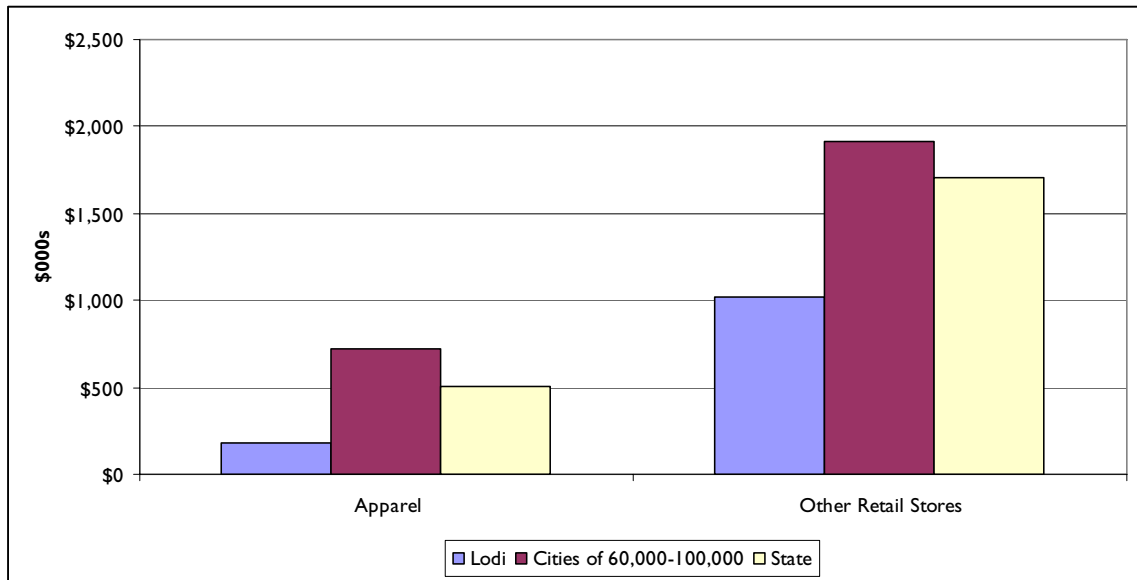
Figure 4.4-4. Auto Sales per Capita



Note: Other cities in San Joaquin County have insufficient numbers of auto dealers to allow reporting by the State Board of Equalization.

Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax)*, 2005

Figure 4.4-5. Apparel and “Other Retail Stores” Sales per Capita



RETAIL OPPORTUNITIES

Additional Retail Space Supported by Future Households and Businesses. Retail businesses in Lodi compete for customers with other stores in a larger market area. In the immediate area, there are some stores in Woodbridge, Flag City, and other unincorporated areas beyond the City limits. Larger retail centers, with more comparison shopping opportunities, are available in Stockton, Tracy, Elk Grove, Sacramento, and the Bay Area. In general, a population of at least 70,000 residents is required to support a regional shopping center, which provides the types of stores—especially apparel and specialty goods—in which Lodi does not perform well.

In the future, Lodi will face competition not only from the existing developments, but also from new shopping centers planned for north Stockton (and, presumably, expanding retail development in Elk Grove and other communities along State Route 99). These new centers will be substantially supported by the residents of those communities, but will also look to the greater region, including Lodi, for added customers.

Without attempting to construct an inventory of proposed shopping centers and projected population growth, it is possible to estimate the amount of new retail development that Lodi could support assuming that average spending patterns per capita remain constant. This estimate may be conservative: although Lodi outperforms San Joaquin County as a whole and the State of California in most retail categories, a growing population will support additional types of outlets, including apparel and specialty stores.

Table 4.4-10. Estimated Purchases in Retail Store Space by Households with Incomes of \$40,000-\$49,999, 2005

<i>Item</i>	<i>Average Annual Household Expenditure</i>
Food at home	\$2,964
Food away from home	2,274
Household furnishings and equipment	1,447
Apparel and services	1,440
Television, radios, sound equipment	820
Housekeeping supplies	546
Personal care products and services	497
Pets, toys, and playground equipment	414
Alcoholic beverages	366
Tobacco products and smoking supplies	364
Entertainment: fees and admissions	360
Entertainment: other supplies, equip., & services	357
Personal services	259
Reading	111
Total: Typical retail outlets	\$12,219

Source: U.S. Department of Commerce, Bureau of Labor Statistics, Consumer Expenditure Survey, on the internet at www.bls.gov/cex/

The estimate of future support for retail—and, concomitantly, the amount of land that should be designated for retail use—is based on the following assumptions:

- The median income of Lodi households, which was about \$40,000 per year in 1999 (as reported in the U.S. Census of 2000), has increased with inflation. The estimated median income in 2006 was about \$48,700.
- The purchasing patterns of Lodi households are similar to those reported in the Consumer Expenditure Survey undertaken each year by the U.S. Department of Commerce, Bureau of Labor Statistics. Based on this survey, it is estimated that households with annual incomes in the range of \$40,000 to \$49,999 spent about \$12,200 per year in 2005 (the most recent year for which data are available) on goods and services that typically occupy retail store space.
- Lodi will add between about 7,700 households and 14,400 households between 2005 and 2030. The lower estimate is based on SJCOG's expectation that the City will add 20,800 residents, and that the average

household size of 2.71 reported in the 2000 Census will be maintained. The higher estimate is based on the possibility that Lodi would grow at its maximum permitted rate of two percent per year, with the same average household size.

- In addition to the purchases made by new Lodi households, existing Lodi households will shift their spending in apparel and “other retail stores” to Lodi, and this shift will be complemented by the City’s attraction of new spending in these retail categories by visitors to the Lodi area. Overall, Lodi’s sales in these two store categories will increase to approximately the overall average for cities with populations between 60,000 and 100,000 residents (see Figure 4.4-5).
- Sales in retail space will average \$322 per square foot, which is the median reported by the Urban Land Institute for community and super community shopping centers in *Dollars and Cents of Shopping Centers/The SCORE 2006*.
- Retail building space typically occupies one-quarter of the site on which it is located. The remainder of the site area is needed for parking, circulation, loading, and landscaping.
- Sales are not siphoned away from Lodi by retail development outside of, but easily accessible from, the city.

The application of these assumptions, and the resulting estimate of new retail space that could be supported in Lodi, is presented in Table 4.4-11. This table shows the calculations based on both the SJCOG population projection and the maximum population growth permitted by Lodi’s two percent growth management limit.

Table 4.4-11. Projected Support for New Retail Space and Land Requirements through 2030

	<i>SJCOG Projection</i>	<i>Growth Limit</i>
New Residents (from Table 2.3-1)	20,807	39,021
Average household size	2.71	2.71
New Households	7,678	14,399
Average spending per household	\$12,200	\$12,200
Total spending by new households	\$93,671,600	\$175,667,800
Additional spending on apparel and "other retail" by existing households	\$90,201,334	\$90,201,334
Total additional spending in Lodi retail stores	\$183,872,934	\$265,869,134
Average sales per square foot of retail building space	\$322	\$322
Total new building space supported by new and existing households	571,000	825,700
Acreage required to accommodate new building space	52	76

Based on Floor Area Ratio of 0.4 and 0.25

Source: Mundie & Associates, based on information from Table 7, U.S. Census, Table 43, and Urban Land Institute, *Dollars and Cents of Shopping Centers/The SCORE 2006*.

Of the total space estimated in Table 4.4-11 (between 571,000 and 825,700 square feet), a substantial proportion—as much as 280,000 square feet, or 25 acres—would be supported by the capture of additional spending on apparel and other retail by existing households (and, perhaps, visitors to Lodi). Typically, this type of space has been provided in “regional” shopping centers, which have between one and four department stores and a collection of smaller specialty stores (including apparel) in between. In recent years, the format of regional shopping centers has become more flexible: today, such a center may be characterized as a “fashion center,” a “lifestyle center,” a “power center,” or an “outlet center.” Typical characteristics of these various types of centers are summarized in Table 4.4-11. Regardless of the specific format, these types of centers attract comparison shoppers from a wide geographic area.

In thinking about retail strategies for the future, Lodi should be aware that regional shopping centers are already present in some of these formats in Stockton and Tracy. Lodi’s ability to attract regional retailing, including apparel and “other retail” (specialty) stores, will depend on not only on the amount of market support available from existing plus new households, but also on the locations of available sites and the speed/ease of the approval process.

Niche Retailing. It is possible that some population groups currently present in Lodi, or expected to grow in the future, are not well-served by existing retail stores. In particular, the population in 2000 was more than one-quarter Hispanic and more than five percent Asian. Both of these demographic groups are expected to grow in the future. Identifying and attracting retailers and/or retail developers who cater to these groups could strengthen Lodi's retail base by capturing some purchases that currently leak out of the City.

Table 4.4-12. Types of Regional Shopping Centers

Type	Concept	Building Space;	
		Land Area	Typical Anchors
Regional Center	General and convenience merchandise	100,000-350,000 sf; 5-35 acres	2+ anchors (dept. stores, mass merchant discount dept. store; apparel)
Fashion/Specialty Center	Higher end; fashion orientation	80,000-250,000 sf; 5-25 acres	No anchors
Lifestyle Center	Upscale national chain specialty stores; dining and entertainment in an outdoor setting	150,000-500,000+ sf; 10-40	0-2 anchors (large bookstore, other large-format specialty retailers, multiplex cinema, large department store)
Power Center	Category-dominant anchors; few small tenants	250,000-600,000 sf; 25-80 acres	"Category killer" stores: home improvements, discount dept. store; warehouse club; off-price retail
Outlet Center	Manufacturers' outlet stores	50,000-400,000 sf; 5-50 acres	No anchors

Source: International Council of Shopping Centers

5 Existing Economic Development Programs

5.1 ADOPTED POLICIES

The current (1991) General Plan contains several policies that relate to economic development. The Land Use and Growth Management Element of the Plan includes the following goal and policies concerning the vitality of downtown:

Goal D: To promote and retain development in downtown Lodi

- Policy 1. The City shall preserve and promote downtown Lodi as the City's social and cultural center and an economically viable retail and professional office district.*
- Policy 2. The City shall encourage future retail commercial and professional office uses to locate in downtown Lodi.*
- Policy 3. The City shall enhance pedestrian activity and pedestrian amenities in downtown Lodi.*
- Policy 4. The City shall preserve the existing small-town scale and character of downtown Lodi.*
- Policy 5. The City shall support downtown merchants in the improvement of building facades, promotion of downtown, and the solution of problems specific to downtown.*

The Housing Element of the current General Plan contains one goal and several policies concerning the availability of housing for all income groups:

Goal A: To provide a range of housing types and densities for all economic segments of the community while emphasizing high quality development and homeownership

- Policy 1. The City shall promote the development of a broad mix of housing types.*
- Policy 2. In new residential development, the City shall attempt to achieve the following mix: 65 percent low density, 10 percent medium density, and 25 percent high density.*

The Conservation Element of the current General Plan addresses the City's interest in preserving the agricultural land that is vital to its economic base:

Goal C: To promote the economic viability of agriculture in and surrounding Lodi and to discourage the premature conversion of agricultural lands to nonagricultural uses, while providing for urban needs

- Policy 1. The City shall ensure, in approving urban development near existing agricultural lands, that such development will not constrain agricultural practices or adversely affect the economic viability of adjacent agricultural practices.*
- Policy 2. The City shall require new development to establish buffers between urban development and productive agricultural uses consistent with the recommendations of the San Joaquin County Department of Agriculture.*
- Policy 3. The City shall adopt a "right-to-farm" ordinance for the purpose of protecting agricultural land from nuisance suits brought by surrounding landowners.*
- Policy 4. The City shall support economic programs established by San Joaquin County for farm preservation.*

The 1991 General Plan contains no policies that address the diversity of the local economy or the balance between jobs and housing.

5.2 EXISTING PROGRAMS

The City of Lodi works with a variety of non-profit and quasi-public agencies to promote economic development. These agencies include:

- Lodi Chamber of Commerce, which advocates on behalf of businesses in the City.
- San Joaquin Partnership, a non-profit, private-public economic development corporation assisting business and industry to locate in San Joaquin County, including the Cities of Escalon, Lathrop, Lodi, Manteca, Ripon, Stockton and Tracy. Location and expansion services are provided directly to the company and/or indirectly to their site consultant or real estate brokerage representatives.
- Downtown Lodi Business Partnership, a non-profit association developed to encourage growth and prosperity in the Downtown Community of Lodi, and to maintain its economic health on an on-going basis. Under agreement with the City of Lodi, the DLBP manages the Downtown Business Improvement Area (BIA), and works in partnership with businesses, property owners, cultural institutions and local city officials to enhance the revitalization efforts of downtown Lodi.
- Lodi Conference and Visitors Bureau, which provides information intended to foster tourism in Lodi.

6 Tourism Potential

With the emergence of Lodi as a premium wine grape region, the potential to attract increased visitor activity, which could in turn help to strengthen the local economy, has attracted increased interest by the business community and the City. Visitors—especially overnight visitors—support the hotel/motel sector along with dining establishments and, potentially, specialty stores that provide an attractive recreational shopping experience that is one element of a weekend getaway.

To evaluate the potential contribution of tourism to the local economy, Mundie & Associates reviewed the Napa County Economic Impact Study. That study, prepared in March 2006, estimated that Napa Valley visitors spend a total of \$2.5 million per day, equivalent to about \$200 per visitor. As might be expected, overnight visitors spend more than day visitors.

Table 6-1. Daily Spending by Type of Expenditure, Napa Valley

Sector	Spending per Person			Total Daily Spending		
	Overnight Visitors	Day Visitors	Overall Average	Overnight Visitors	Day Visitors	Total
Hotel	\$62.94	\$1.40	\$37.40	\$473,861	\$7,568	\$481,429
B&B	12.52	2.81	8.49	94,243	15,208	109,451
Camping	1.86	0.37	1.34	14,048	1,978	17,262
Restaurant	62.42	48.69	56.38	470,424	261,321	726,797
Groceries	4.05	2.99	3.61	30,560	16,063	46,623
Gas	6.30	5.53	5.98	47,467	29,582	77,049
Shopping*	15.81	9.96	13.38	119,170	53,506	172,677
Wine	36.56	42.65	39.08	275,503	228,309	503,812
Tasting	8.78	7.25	8.15	66,107	38,783	104,890
Entertainment	10.13	7.35	8.98	76,169	39,441	115,610
Other	12.11	17.48	14.34	91,522	94,159	185,681
Total	\$233.48	\$146.48	\$197.13	\$1,759,074	\$785,918	\$2,541,281

* Retail/Antiques/Other

Source: Napa County Conference and Visitors Bureau and Purdue Tourism and Hospitality Research Center, Napa County Economic Impact Study, An Executive Report, p. 17.

For Napa, these figures translate into total annual spending of \$927.6 million for an estimated average of about 12,900 visitors per day.

The average of about 12,900 visitors per day is equivalent to a total of 4.7 million person trips during a calendar year. The Napa study estimates that this total is comprised of 2.75 million overnight trips and 2 million day trips.

To capture visitor overnight stays, the four cities of the Napa Valley offer upwards of 2,400 hotel, motel, and B&B rooms.

The study estimates that tourism in the Napa Valley supported about 17,500 full- and part-time jobs in Napa County, providing almost \$500 million in wages and salaries. These figures suggest an overall average wage of \$28,570. (This average includes both full-time and part-time jobs.) This average is lower than the current overall average wage in San Joaquin County of \$37,229 estimated in Table 4.3-6.

To capture the level of spending on visitor accommodations, restaurant meals, wine, and other retail items estimated in the Napa Valley study, Lodi would, at a minimum, have to increase its inventory of hotels and restaurants. At present, Lodi has 14 hotels, motels, and inns, with a total of about 452 rooms. Two additional motels, with a total of 108 rooms, are located west of the city, at the interchange of I-5 and State Route 12.

For comparison, Healdsburg, in the wine country of Sonoma County, has 228 hotel/motel rooms; Paso Robles, in the wine country of San Luis Obispo County, has 892 rooms. Additional characteristics of Healdsburg and Paso Robles are compared to those of Lodi in Table 6-2.

Table 6-2. Comparison of Three Wine Country Cities

	<i>Lodi</i>	<i>Healdsburg</i>	<i>Paso Robles</i>
Population (2006)	62,828	11,680	28,896
Hotel Rooms	452	228	892
Eating/Drinking Places (2005)	180	44	114
Retail Sales ^a (\$000s) (2005)	\$730,059	\$222,790	\$590,765
Wineries ^b	53 ^c	67 ^d	39 ^e

a Sales in retail stores only.

b Listed on web sites.

c 33 of these wineries have tasting rooms.

d 9 wineries have tasting rooms in town; four wine shops also offer tasting in town. There are 180 wineries in Sonoma County.

e All 39 wineries offer tasting.

Sources: California Department of Finance (population); Mundie & Associates (hotel rooms), California Board of Equalization (eating/drinking places and retail sales); www.lodiwine.com, www.vervu.com, and wineriesofpaso.com (wineries).

Tourism related to agricultural activity, including wine grapes and wine tasting, is highly seasonal: peak seasons are in the fall, during the crush and, to a lesser degree, during the spring when the weather is nice and the grapes are beginning to show on the vines. In addition, visitor activity exhibits a cycle of intense activity on the weekends and significantly less activity on weekdays. The visitor industry in the Napa Valley did not become able sustain the accommodations sector until well into the 1980s, following intense activity to expand the overnight market beyond weekends during the fall and spring. (The expansion effort included marketing to conferences and other mid-week gatherings that would fill hotel rooms.) These extremes of peak and off-peak visitation by season and by weekday/weekend create formidable challenges for visitor accommodations and for restaurants that cater to the visitor market.

Beyond offering over 400 wineries, many of which offer tours and tasting, the Napa Valley offers other lures to prospective visitors, including scenic views that are not replicated in the Central Valley, a much larger geographic expanse with a variety of tours and settings, several golf courses with premium visitor accommodations, thermal hot springs, hot air balloon and glider rides, a multitude of fine dining establishments, and a cachet that has not yet been achieved in Lodi. These conditions suggest that it will require a sustained concerted effort for Lodi to realize the magnitude of visitor support that the Napa Valley has achieved.

Considering these factors, what is the potential for tourism in the Lodi economy? Extrapolation from the results of the Napa Valley study may overstate Lodi's potential because of the different conditions mentioned above; at the same time, the Lodi region is increasingly attractive to Central Valley residents who desire a wine-oriented getaway but are put off by the traffic congestion on routes that would take them to the Napa Valley. An optimistic estimate of the potential in Lodi may be sketched out by using the Napa estimates as a reference point.

Assuming that Lodi could attract one-quarter of the visitor spending that the Napa Valley attracts, that spending would amount to about \$230 million per year (with one-eighth of the visitor activity, total spending could amount to about \$115 million per year). If about the same proportion of visitor spending in Lodi were devoted to hotel/motel room nights as the proportion in the Napa Valley, then visitor accommodations would yield nearly \$266,000 per year (in today's dollars) in transient occupancy tax revenues. Even if Lodi were to achieve one quarter of Napa Valley's overnight visitor level, the number of hotel rooms would be about 600, or about 150 more than the present number. This assumes that many of the existing hotels would be substantially rehabilitated and upgraded to a tourist class.

7 General Plan Implications of Population, Housing, and Economics Conditions and Projections

7.1 POPULATION AND HOUSING GROWTH

PROJECTED POPULATION AND HOUSEHOLD GROWTH

The projections of population growth may be translated into projections of new households and housing needs by applying factors for household size and vacancy rates. The SJCOG projections yield an estimate of about one-half the numbers of households and housing units that could be permitted by Lodi's two percent growth rate cap.

Table 7.1-1. Housing Requirements

	<i>SJCOG Projection</i>	<i>Maximum Permitted</i>
Added population from 2005	20,807	39,021
Added households at 2.71 persons/household	7,678	39,021
Added housing units at 5% vacancy	8,082	14,399

Source: Mundie & Associates

HOUSEHOLD INCOMES AND HOUSING PRICES

A comparison of the income required to purchase a median-priced home in Lodi (below) to the income distribution of households reported in the 2000 census (Tables 3.2-2 and 3.2-3) suggests that only about 30 percent of the City's households can afford to purchase the median-priced home. At November 2005 prices, only about 20 percent could afford the median-priced home (assuming that incomes have risen with inflation since 1999).

Table 7.1-2. Income Required to Purchase a Median-Priced House in Lodi

	Nov. 2006 Median Price	Nov. 2005 Median Price
Median Housing Price	\$352,500	\$419,750
Mortgage @ 80%	\$282,000	\$335,800
Monthly Payment*	\$1,691	\$2,013
Required Monthly Income**	\$5,123	\$6,101
Required Annual Income	\$61,481	\$73,211

* Assumes interest rate of 6 per year, 30 year term.

**Assumes monthly payment may not exceed 33% of income

Source: Mundie & Associates

A comparison of the incomes required to purchase housing, shown in Table 7.1-2, and median wages for various occupations, shown in Table 4.3-6, indicates that some Lodi households with only one worker may be able to afford the median-priced house, depending on the occupation of that worker.

7.2 EMPLOYMENT GROWTH

SJCOG projects that employment in Lodi will increase from 23,438 jobs in 2005 to 33,686 jobs in 2030. This gain of 10,248 jobs would represent growth of about 44 percent.

Because the SJCOG employment projections are not detailed by industry, it is difficult to discuss the types of jobs that might be included in this growth. The recent decision by Blue Cross to relocate its call center to another site within Lodi, with expectations of expansion, is an indication that the City remains attractive to businesses that require a reliable and affordable power supply. The following additional observations may be considered:

- Lodi currently has a slight deficit of jobs compared to the number of employed residents, even without considering that the jobs available may not match the skills of those workers. About 44 percent of employed Lodi residents work within the City; all together, about 77 percent work in San Joaquin County.
- Situated between the larger cities of Stockton and Elk Grove, with Sacramento just beyond Elk Grove, Lodi is unlikely to become a major regional employment center in the short term. Instead, the City will appeal to (1) activities that are heavy power users, and appreciate Lodi's utility rates, and (2) executives who locate their businesses in Lodi because they appreciate the character and ambiance of the City.

Table 7.2-1. Vacant Parcels Designated for Light or Heavy Industrial Use

<i>Parcel Size in Acres</i>	<i>Parcels</i>	<i>Total Acres</i>
Up to 0.5	59	15.75
0.51-1.0	29	20.02
1.01-5.0	31	81.02
5.01-10.0	10	71.02
10.01-15.0	3	41.55
More than 15.0	2	36.33
Total	134	265.69

Source: Dyett & Bhatia, 2007

- Stakeholders interviewed for the General Plan update noted that Lodi lacks large sites for new employment uses.

Information available for this General Plan update indicates that the City has between 265 and 270 acres of vacant land designated for industrial use (including both light and heavy industry), but that only 15 of the 134 parcels so designated are five acres or larger, and only five parcels are larger than ten acres. Table 7.2-1 summarizes the distribution of vacant parcels designated for industrial use.

Without a greater supply of larger parcels, Lodi cannot attract major industrial users. (Industrial development is typically characterized by floor area ratios of no more than 0.3. Therefore, a five-acre parcel would accommodate a building of about 65,340 square feet.)

If the City is to achieve some of the employment growth projected by SJCOG by attracting (or retaining) major industrial users, additional land—in parcels ranging in size up to 50 acres—should be designated for commercial and/or industrial development.

- Jobs associated with the tourism industry are unlikely to pay well enough for most workers to afford the type of housing currently available in Lodi. If the tourism strategy is to be pursued, appropriately priced housing must be provided; otherwise, it may be difficult to fill the jobs that are needed to provide quality visitor services.
- The growing population may support new types of retail stores (e.g., the regional shopping center described earlier in this paper) as well as other “import substitution” activities—those for which Lodi residents must currently travel to larger population centers—such as additional specialized medical services.

7.3 PROJECTED DEMAND FOR RESIDENTIAL AND NONRESIDENTIAL DEVELOPMENT IN THE GENERAL PLAN

RESIDENTIAL DEVELOPMENT

The amount of land required for new residential development will depend on the density at which that development is permitted to occur. Table 7.3-1 summarizes the amount of land that would be required for new housing at different densities.

Table 7.3-1. Housing Demand and Acreage Requirements

<i>Average Density for All Residential Development Types</i>	<i>SJCOG Pro- jection</i>	<i>Maximum Permitted</i>
Added housing units (from Table 7.1-1)	8,082	14,399
Acres of land required for development if average density is:		
4 units per acre	2,020	3,789
5 units per acre	1,616	3,031
6 units per acre	1,347	2,526
8 units per acre	1,010	1,895
10 units per acre	808	1,516
12 units per acre	673	1,263

Source: Mundie & Associates

These estimates do not take into consideration land needed for roads, parks, schools, etc. Estimates of the amount of land required for new residential development will be refined and explored during the next phase of the General Plan update process (formulation of alternatives).

NONRESIDENTIAL DEVELOPMENT

Because the SJCOG employment projections are not detailed by industry, it is difficult to estimate the land requirements of this employment growth in Lodi. Several approaches are possible:

- The retail sales analysis, above, estimates that Lodi will support 35 to 75 acres of additional retail uses by the year 2030 (with the variables being the amount of retail space, and the floor area ratio or FAR of development). Some of this additional retail use will be located in the new Super Wal-Mart store on Lower Sacramento Road, which is undergoing approval process.
- The California Employment Development Department has prepared a projection of employment in San Joaquin County as a whole for 2002-2012, which shows little shift among sectors for the county as a whole. Assuming, based on this observation, that the distribution of SJCOG-projected employment among sectors in Lodi also remains similar to its current pattern, the 44 percent increase in overall employment could be expected to result in a 44 percent increase in the amount of

land occupied by employment uses if existing development intensities persist into the future.

At present, Lodi has an estimated 1,292 acres of non-residential development (including retail, office, industrial, and mixed-use areas). An increase of 44 percent would equal about 570 additional acres of non-residential use.

- Employment densities in smaller cities typically average about 30 workers per acre. Typical employment densities are shown in Table 7.3-2. Applying this average density to the projection of about 10,250 new jobs yields an estimated need for about 340 acres of land designated for commercial and industrial use.

Table 7.3-2. Typical Employment Densities

<i>Use</i>	<i>Building Space per Worker</i>	<i>Building Configuration</i>	<i>Employment Density</i>
Office	250 sq. ft.	1-story building: 0.25 FAR*	44 workers per acre
		2-story building: 0.5 FAR	87 workers per acre
R&D	350 sq. ft.	1-story building: 0.25 FAR	31 workers per acre
		2-story building: 0.5 FAR	62 workers per acre
Industry	600 sq. ft.	1-story building: 0.25 FAR	18 workers per acre
		1-story building: 0.3 FAR	22 workers per acre
Warehouse	1000 sq. ft.	.3 FAR	13 workers per acre

* FAR = floor area ratio; that is, the amount of building area divided by the amount of land area.

Source: Mundie & Associates

- Lodi's intention to expand economic activity in the tourism/visitor accommodation sector is unlikely to require specific adjustments to land use and zoning designations, because those types of uses are typically permitted in existing commercial land use categories. This type of activity may, however, benefit from careful evaluation of the locations designated for new commercial development.

Options for the locations and development character of lands designated for nonresidential development will also be refined and expanded during the next phase of the General Plan update process.

8 Policy Choices for Growth and Development

The population and employment growth expected to occur during the time frame of the new General Plan, and the new development required to accommodate it, raise a series of issues for the community to consider as it formulates the new Plan. Key questions that must be addressed are listed below.

Questions of economics and market demand overlap with those of land use and urban design; thus, many of the policy issues discussed below are also discussed in the other working papers.

8.1 RESIDENTIAL DEVELOPMENT POLICIES

Should Lodi's annual residential growth management limitations be revisited?

Lodi adopted its residential growth limit of two percent per year in 1991. Since that time, residential growth has averaged about one percent per year (see Table 7.1-1). Some residential developers assert that the two percent limit effectively limits growth to a much lower rate as a result of the process required to secure development approvals and their inability to secure permits in certain peak years of demand.

Because unused permits roll over, the City currently has a large availability of residential development allocations. Therefore, the peak period permit constraint issues may not be limiting in future years. The *Land Use, Transportation, Environmental Resources, and Infrastructure Assessment* Working Paper reviews issues of growth management in greater detail.

In the last several years, a new development trend has been observed: developers have proposed large, master-planned projects that will be built out over a number of years. These projects have been permitted subject to development agreements that grant the right to build new housing (and non-residential uses) for several years in return for the developers' agreeing to make certain contributions to and improvements for the City. These types of agreements may result in growth rates that are closer to the City's two percent limit, because the residential development they allow will not be subject to the approval process for each increment of growth.

With the large developments, development agreements, and the rolled over permits, the potential for higher growth rate in the future exists. Nonetheless, the two percent growth limit could prove to be a constraint again in some years in the future. If the City is interested in achieving a growth rate of two percent, it may wish to consider establishing growth rates that are somewhat higher than this, or allow for greater exemptions from the limits.

What are appropriate densities for new housing, and how can we assure that densities shown in the General Plan are achievable?

Future residential densities will need to balance competing interests: farmland preservation and compact growth with walking access to stores and services vs. desire for larger homes and individual yards; the need to maintain Lodi's overall character and small-town ambiance while accommodating growth; and infill vs. outward development, as well as the need to promote housing affordability.

Looking ahead to the aging of the Lodi population and an increase in the number of senior households, it may be appropriate to increase the amount of land designated for higher-density housing, and to locate at least some of that land on sites that are advantageous to seniors: within walking distance of retail stores (including supermarkets/groceries and drug stores) and services, along transit routes, and near medical offices

Another density-related issue is the ability to accommodate new households while preserving the agricultural lands that surround Lodi and are considered key to the City's future as a tourist destination. To reduce the pressure for expansion into the surrounding agricultural areas, the City may wish to consider minimum density requirements in addition to maximum densities as it formulates policies for residential development and/or strategies to facilitate the development of infill sites.

While higher residential densities will help preserve farmland, the continuing availability of land that is designated for higher-density housing in the current General Plan illustrates the fact that townhomes, condominiums, and apartments may not be demanded by households moving to (or within) Lodi. Issues of residential density are addressed in greater detail in *Working Paper #4: Urban Design and Livability*.

8.2 RETAIL DEVELOPMENT POLICIES

Where should new retail development be located?

Lodi has a long-standing policy of supporting its downtown. Nevertheless, changing patterns of retailing—dominated by the emergence of “big box” stores—have meant that an increasing number of large stores, with powerful attractiveness to Lodi households, have located outside of downtown, sometimes at the edge of the City. These newer centers have drawn some stores out of downtown (e.g., to the vicinity of Lower Sacramento Road and West Kettleman Lane (State Route 12), creating new challenges for the downtown area. An aggressive revitalization effort undertaken during the past decade restored and enhanced the downtown area, but continued attention to the appropriate locations for stores that may compete with downtown businesses is required if the current vitality is to be sustained.

A corollary question about new retail development is, “what form should it take?” Certainly, new neighborhood shopping centers (a supermarket, possibly a drug store, and some “satellite” store spaces) will be needed as new residential development occurs, especially in the large master-planned areas on the south and west sides of Lodi.

The additional stores that would appeal to a market area beyond the immediate neighborhood may be called, for convenience, regional shopping areas. The regional center has evolved over time from an uncovered pedestrian mall surrounded by parking to a covered mall, often with multiple stories, surrounding by parking, and, more recently, on to a variety of newer forms. “New urban” models, such as Santana Row in San Jose or Bay Street in Emeryville, integrate regional shopping with multi-family housing, hotels, and entertainment uses, with parking on surrounding surface lots, in adjacent structures, or underground (or a combination of those arrangements). Still other communities—notably, Walnut Creek and Healdsburg, CA, Jackson, WY, and Durango, CO, all of which attract substantial visitor activity—have integrated the types of stores that would typically locate in a regional shopping center into the fabric of their downtowns, creating support for the existing businesses and adding more vitality to the City’s true historical urban center. (A summary of shopping center types recently inventoried by the International Council of Shopping Centers is provided in Table 4.4-11.)

Although a number of these new formats could be attractive to the City of Lodi, the ultimate nature of new retailing will be determined by the City in combination with a retail developer: the site(s) chosen must have characteristics that are attractive to developers, (and retailers), such as good visibility (preferably from the freeway), good access (also from the freeway), and low cost (which may make infill sites less desirable).

Lodi would also benefit from the attraction of additional new car dealerships. Is there a location for new dealers that makes sense from the perspective of both the dealers and the City? Should Lodi consider establishing an auto mall, where most or all of its auto dealers would be located? (An auto mall would differ from the existing pattern of auto retailing by offering a consolidated location for new car dealerships with opportunities for coordinated advertising and promotions, possibly under unified management. In the case of Lodi, such a change may be more cosmetic than functional, since many of the existing dealers are clustered along Cherokee Lane. Establishing an auto mall could, however, provide an opportunity to attract additional dealerships, depending on how much land could be assembled.)

On a more local level, a mainstay of City land use patterns has always been the neighborhood shopping center, providing convenience retail goods (groceries, drug store goods, stationery, personal services, and other items) to the people who live nearby. These neighborhood centers not only provide convenient access to goods and services, but also help to minimize the amount of traffic on City streets.

8.3 INDUSTRIAL DEVELOPMENT POLICIES

Where should additional land for industry be located?

The east side has historically been Lodi's primary industrial location, with a few notable exceptions (e.g., General Mills). Several factors may affect whether continuing to cluster industry in the same place is advantageous:

- Do new types of industrial activities, such as call centers and wineries, belong in the traditional industrial area? These uses have different traffic generation characteristics (from the existing industries and from each other), and different types of linkages to other activities. The Blue Cross Call Center has made a statement by selecting a new location in the Reynolds Ranch project, on the south side of Lodi west of U.S. 99. Would other large employers find Lodi more attractive if their location options were expanded?
- Non-industrial uses may be more appropriate near the new Delta College campus on the east side. Uses that take advantage of the student population, such as retail stores, eating/drinking places, and housing, may be more advantageous to the city in that area. Either industrial or student-oriented uses may, however, conflict with the city's policies regarding agricultural preservation.
- Where are large parcels that could be designated for industrial use? As indicated earlier in this paper, Lodi has about 265 acres of vacant land designated for industrial use, but only 15 parcels, with a total of 148 acres, are larger than five acres. Are there new locations, where larger parcels are still available, that would be suitable for major employers?

- Should wineries be located on industrial land? The County of Napa ascertained at one time that it could be advantageous to locate new wineries in business or industrial parks, so they would not occupy land that could otherwise be used for grape production. In Lodi, such a requirement might be resisted by winery owners, who can avoid duplication of office space and personnel if they maintain their wineries and tasting rooms at the vineyard.

Key issues to be considered as decisions about industrial locations are made include not only parcel sizes but also access from the freeway system and rail facilities, and the availability of infrastructure to serve new development.

8.4 EMPLOYMENT DEVELOPMENT POLICIES

Should the City target specific sectors for job growth?

At present, Lodi's major employers are concentrated in the food processing and plastics sectors. Continued vitality of the wine grape industry, availability of affordable power, and access to transportation (via Interstate 5, US 99, and railroads) will support Lodi's efforts if it chooses to pursue these types of industries in the future. The recent decision of Blue Cross to remain in Lodi, moving to a larger facility, reinforces the importance of a reliable power supply and a steady labor force in the City.

Business activities that supply or rely on Lodi's existing businesses may find it advantageous to locate in Lodi, if they can find sites that meet their needs.

Table 4.3-4 indicates that about one-quarter of Lodi residents are employed in management, professional, and related occupations, and another one-quarter are in sales and (other) office occupations. Industries with high proportions of workers in these occupations may find Lodi particularly attractive.

As noted elsewhere in this paper, Lodi has expressed interest in increasing the City's level of tourist activity. This effort would require an increase in the number of rooms in visitor accommodations (hotels, motels, and B&Bs), and possibly increases in restaurants and retail stores. Jobs in these types of businesses typically earn wages on the lower end of the income scale: in some communities that are heavily oriented to tourism, major resort operators are required to provide affordable housing for some percentage of their employees. If Lodi actively pursues tourism, attention should be paid to related issues of affordable housing for workers.

8.5 ATTRACTING VISITORS TO LODI

What can the City do to enhance visitor activity?

The City anticipates that increases in tourism will support the local economy and will strengthen the City's fiscal condition by increasing revenues from transient occupancy taxes and sales taxes. As noted earlier in this report, Lodi would need some increase in the number of hotel and motel rooms to accommodate the level of visitor activity captured by the Napa Valley.

Stakeholders interviewed during the General Plan update process indicated that Lodi faces challenges in attracting major new hotels. Foremost among these challenges is the hotels' desire for solid business demand (typically indicated by a larger business that requires regular visits from associated suppliers, clients, and company personnel located in other cities). It may be that the first step in increasing wine-related tourism in Lodi is the attraction of an office-based regional headquarters; e.g., for a plastics company, food processor, or other company that has some functional relationship to Lodi's existing economy (or that requires a central California location but does not find Stockton or Sacramento appealing). The promise of business trip-related activity would help a hotel/motel justify a new location in an area where tourism is a highly seasonal activity.

Even with additional accommodations, Lodi may not have the critical mass of attractions necessary to achieve the level of visitor activity that is captured by the Napa Valley. This paper mentions that, in addition to more than three times as many wineries/tasting opportunities as there are in Lodi, Napa Valley has destination golf resorts, thermal hot springs, balloon and glider rides, and a natural setting with scenic views that are unavailable in the Central Valley. Therefore, complementary or supplementary activities are likely to be required to draw substantial additional visitation.

Other Central Valley cities have had some success in attracting visitors to tournament-capable sports facilities. Stakeholder interviews in Lodi indicated local interest in cricket fields, and the City may consider the advisability of creating a multi-use facility that could be used for cricket, soccer, and other field sports with a view toward hosting tournaments on a regular basis. This investment would be particularly worthy of consideration if the tournament season does not conflict with the peak wine tourism season. The location of such tournament facilities would be important for capturing added visitor spending.

Natural and scenic resources are also important, and may become visitor destinations. Lodi may decide to explore the development of specific, targeted recreational facilities at Lodi Lake and along the Mokelumne River, both of which offer beautiful scenery.

Maintaining an attractive downtown, and strengthening the retail base of downtown, and presenting a welcoming atmosphere are also keys to fostering tourism. Lodi must not only attract visitors, it must entice them to stay overnight and to spend money within the City for tourism to be an effective economic and fiscal tool. Programming at Hutchins Street Square could contribute to this effort, but the level of activity/number of performances would have to increase for the facility itself to become a more powerful destination for out-of-towners.

Appendix

Selected Taxable Sales Calculations

Total Sales and Sales per Capital

City	County	Population	Taxable Sales (\$000s)			Taxable Sales per Capita		
			Total All Outlets	Retail Stores	Auto Dealers/ Supplies	Retail Stores	Total Retail Sales	Auto Dealers/ Supplies
State Total		37,172,015	\$536,904,428	\$375,808,125	\$112,167,922	\$10,110	\$14,444	\$3,018
LODI	San Joaquin	62,817	889,827	730,059	203,707	11,622	14,165	3,243
RIALTO	San Bernardino	99,189	976,752	607,605	23,933	6,126	9,847	241
COMPTON	Los Angeles	98,948	477,689	257,320	25,924	2,601	4,828	262
CARLSBAD	San Diego	98,607	2,381,346	1,918,846	760,701	19,460	24,150	7,714
MISSION VIEJO	Orange	97,997	1,609,328	1,399,337	256,834	14,279	16,422	2,621
CARSON	Los Angeles	97,981	1,762,183	1,265,392	454,931	12,915	17,985	4,643
EL CAJON	San Diego	96,867	2,133,796	1,873,661	551,979	19,343	22,028	5,698
VACAVILLE	Solano	96,395	1,380,182	1,156,563	227,839	11,998	14,318	2,364
VICTORVILLE	San Bernardino	95,145	2,011,454	1,811,721	528,258	19,042	21,141	5,552
VISTA	San Diego	94,440	1,113,593	872,869	110,029	9,243	11,792	1,165
SAN MATEO	San Mateo	94,315	1,476,428	1,286,922	127,743	13,645	15,654	1,354
TEMECULA	Riverside	93,923	2,630,386	2,285,398	600,906	24,333	28,006	6,398
MURRIETA	Riverside	92,933	1,025,757	900,921	87,859	9,694	11,038	945
WESTMINSTER	Orange	92,408	1,531,790	1,406,313	440,932	15,219	16,576	4,772
SANTA MONICA	Los Angeles	90,750	2,728,291	2,153,197	538,708	23,727	30,064	5,936
SANTA MARIA	Santa Barbara	90,204	1,544,187	1,319,298	320,087	14,626	17,119	3,548
REDDING	Shasta	89,973	2,048,971	1,655,400	340,747	18,399	22,773	3,787
CLOVIS	Fresno	89,924	1,333,463	1,168,795	295,665	12,998	14,829	3,288
SANTA BARBARA	Santa Barbara	89,548	1,711,326	1,428,787	177,401	15,956	19,111	1,981
ALHAMBRA	Los Angeles	89,326	1,172,438	1,054,524	428,593	11,805	13,125	4,798
HAWTHORNE	Los Angeles	88,458	979,006	838,445	173,656	9,478	11,067	1,963
CITRUS HEIGHTS	Sacramento	86,883	1,135,130	1,057,279	63,573	12,169	13,065	732
WHITTIER	Los Angeles	86,841	830,600	681,893	187,646	7,852	9,565	2,161
NEWPORT BEACH	Orange	83,361	2,358,641	1,856,766	430,653	22,274	28,294	5,166
LAKEWOOD	Los Angeles	83,287	1,079,953	1,040,402	126,279	12,492	12,967	1,516
LIVERMORE	Alameda	81,443	1,688,249	1,035,396	140,655	12,713	20,729	1,727
BUENA PARK	Orange	81,349	1,504,214	1,123,544	548,804	13,811	18,491	6,746
SAN LEANDRO	Alameda	81,074	1,978,944	1,378,296	284,497	17,000	24,409	3,509
BALDWIN PARK	Los Angeles	80,986	530,775	445,434	11,412	5,500	6,554	141
TRACY	San Joaquin	80,461	1,164,898	1,021,399	275,477	12,694	14,478	3,424
HESPERIA	San Bernardino	80,268	614,039	457,646	56,937	5,701	7,650	709
CHICO	Butte	79,091	1,566,751	1,361,815	228,356	17,218	19,809	2,887
CHINO	San Bernardino	78,055	1,512,949	935,450	120,693	11,984	19,383	1,546
CHINO HILLS	San Bernardino	77,969	418,716	401,307	11,637	5,147	5,370	149
LAKE FOREST	Orange	77,859	1,273,898	885,136	123,503	11,368	16,362	1,586

Total Sales and Sales per Capital

City	County	Population	Taxable Sales (\$000s)			Taxable Sales per Capita		
			Total All Outlets	Retail Stores	Auto Dealers/ Supplies	Retail Stores	Total Retail Sales	Auto Dealers/ Supplies
BELLFLOWER	Los Angeles	77,039	489,033	418,537	165,588	5,433	6,348	2,149
SAN MARCOS	San Diego	76,725	1,442,193	1,050,797	85,811	13,696	18,797	1,118
NAPA	Napa	76,705	1,049,931	829,607	123,438	10,816	13,688	1,609
MERCED	Merced	76,225	1,189,830	979,374	261,173	12,848	15,609	3,426
REDWOOD CITY	San Mateo	76,087	1,594,319	1,162,294	410,321	15,276	20,954	5,393
ALAMEDA	Alameda	74,405	536,486	449,677	76,668	6,044	7,210	1,030
UPLAND	San Bernardino	74,099	886,697	737,711	98,371	9,956	11,966	1,328
LYNWOOD	Los Angeles	73,044	297,453	252,628	26,993	3,459	4,072	370
MOUNTAIN VIEW	Santa Clara	71,995	1,241,047	892,404	n.a.	12,395	17,238	
TUSTIN	Orange	71,767	1,753,089	1,489,704	626,897	20,758	24,428	8,735
INDIO	Riverside	71,654	795,341	675,657	253,403	9,429	11,100	3,536
UNION CITY	Alameda	71,152	714,523	485,665	13,619	6,826	10,042	191
REDLANDS	San Bernardino	71,086	1,100,337	919,176	255,042	12,930	15,479	3,588
HEMET	Riverside	69,544	1,006,866	907,128	256,630	13,044	14,478	3,690
FOLSOM	Sacramento	69,445	1,724,491	1,601,399	592,884	23,060	24,832	8,537
PLEASANTON	Alameda	67,876	1,903,874	1,365,668	313,761	20,120	28,049	4,623
TURLOCK	Stanislaus	67,876	1,024,325	840,080	143,698	12,377	15,091	2,117
APPLE VALLEY	San Bernardino	67,507	312,502	292,774	7,747	4,337	4,629	115
REDONDO BEACH	Los Angeles	67,112	871,808	772,051	48,775	11,504	12,990	727
PICO RIVERA	Los Angeles	66,980	673,326	532,063	n.a.	7,944	10,053	
YORBA LINDA	Orange	66,794	550,871	439,727	12,688	6,583	8,247	190
SAN CLEMENTE	Orange	66,280	577,390	436,246	14,136	6,582	8,711	213
LAGUNA NIGUEL	Orange	66,178	1,024,372	894,250	180,983	13,513	15,479	2,735
WALNUT CREEK	Contra Costa	66,111	1,803,610	1,553,305	466,994	23,495	27,282	7,064
MONTEBELLO	Los Angeles	65,423	1,061,787	829,344	118,063	12,677	16,230	1,805
MILPITAS	Santa Clara	65,276	1,271,309	866,198	15,132	13,270	19,476	232
HUNTINGTON PARK	Los Angeles	64,607	596,526	547,497	142,498	8,474	9,233	2,206
DAVIS	Yolo	64,585	524,482	487,649	195,440	7,550	8,121	3,026
MONTEREY PARK	Los Angeles	64,387	436,335	354,683	n.a.	5,509	6,777	
CAMARILLO	Ventura	64,034	1,036,247	759,559	52,333	11,862	16,183	817
MANTECA	San Joaquin	63,703	755,185	641,252	157,168	10,066	11,855	2,467
NATIONAL CITY	San Diego	63,537	1,586,364	1,410,571	621,655	22,201	24,968	9,784
PITTSBURG	Contra Costa	62,979	747,979	601,296	191,786	9,548	11,877	3,045
ENCINITAS	San Diego	62,815	1,027,460	911,241	151,760	14,507	16,357	2,416
PALO ALTO	Santa Clara	62,148	1,709,121	1,250,630	203,898	20,123	27,501	3,281
SOUTH SAN FRANCISCO	San Mateo	61,824	1,093,627	665,818	52,004	10,770	17,689	841
LA HABRA	Orange	61,789	832,329	725,346	100,861	11,739	13,471	1,632
GARDENA	Los Angeles	61,513	788,126	572,417	104,691	9,306	12,812	1,702
YUBA CITY	Sutter	60,507	949,753	827,961	154,136	13,684	15,697	2,547
STOCKTON	San Joaquin	286,041	3,740,637	3,048,005	662,421	10,656	13,077	2,316

Total Sales and Sales per Capital

City	County	Population	Taxable Sales (\$000s)			Taxable Sales per Capita		
			Total All Outlets	Retail Stores	Auto Dealers/ Supplies	Retail Stores	Total Retail Sales	Auto Dealers/ Supplies
FAIRFIELD	Solano	105,601	1,628,335	1,365,993	319,700	12,935	15,420	3,027
ELK GROVE	Sacramento	130,874	1,738,501	1,532,132	535,577	11,707	13,284	4,092
LATHROP	San Joaquin	14,625	247,893	88,196	n.a.	6,030	16,950	n.a.
RIPON	San Joaquin	13,908	220,157	186,328	n.a.	13,397	15,830	n.a.
ESCALON	San Joaquin	7,044	82,380	72,471	n.a.	10,288	11,695	n.a.
PETALUMA	Sonoma	56,727	1,016,393	773,869	314,294	13,642	17,917	5,540
EL PASO DE ROBLES	San Luis Obispo	28,969	681,878	590,765	120,630	20,393	23,538	4,164
HEALDSBURG	Sonoma	11,704	289,534	222,790	80,253	19,035	24,738	6,857
SONOMA	Sonoma	9,893	206,610	179,276	20,303	18,122	20,884	2,052

Source: State Board of Equalization, Taxable Sales in California (Sales and Use Tax), 2005

Rank Based on Sales per Capita*Population Rank*

<i>City</i>	<i>County</i>	<i>Population Rank</i>	<i>Total Retail Sales Rank*</i>	<i>Retail Stores Rank*</i>	<i>Auto Dealers/Supplies Rank*</i>
LODI	San Joaquin	71	49	52	31
RIALTO	San Bernardino	4	69	74	71
COMPTON	Los Angeles	5	81	84	70
CARLSBAD	San Diego	6	12	11	4
MISSION VIEJO	Orange	7	33	24	37
CARSON	Los Angeles	8	26	37	17
EL CAJON	San Diego	9	15	12	10
VACAVILLE	Solano	10	48	46	41
VICTORVILLE	San Bernardino	11	16	13	11
VISTA	San Diego	12	62	66	60
SAN MATEO	San Mateo	13	40	28	58
TEMECULA	Riverside	14	4	1	8
MURRIETA	Riverside	15	66	61	63
WESTMINSTER	Orange	16	32	21	16
SANTA MONICA	Los Angeles	17	1	2	9
SANTA MARIA	Santa Barbara	18	30	22	24
REDDING	Shasta	19	14	15	21
CLOVIS	Fresno	20	45	34	29
SANTA BARBARA	Santa Barbara	21	23	19	48
ALHAMBRA	Los Angeles	22	53	49	15
HAWTHORNE	Los Angeles	23	65	63	49
CITRUS HEIGHTS	Sacramento	24	55	45	66
WHITTIER	Los Angeles	25	70	69	44
NEWPORT BEACH	Orange	26	2	5	14
LAKEWOOD	Los Angeles	27	57	42	57
LIVERMORE	Alameda	28	19	39	51
BUENA PARK	Orange	29	25	25	7
SAN LEANDRO	Alameda	30	11	18	26
BALDWIN PARK	Los Angeles	31	78	79	77
TRACY	San Joaquin	32	47	40	28
HESPERIA	San Bernardino	33	75	77	68
CHICO	Butte	34	20	17	35
CHINO	San Bernardino	35	22	47	56
CHINO HILLS	San Bernardino	36	80	81	76
LAKE FOREST	Orange	37	34	54	55
BELLFLOWER	Los Angeles	38	79	80	45
SAN MARCOS	San Diego	39	24	26	61
NAPA	Napa	40	50	55	54

Rank Based on Sales per Capita

Population Rank

City	County	Population Rank	Total Retail Sales Rank*	Retail Stores Rank*	Auto Dealers/Supplies Rank*
MERCED	Merced	41	41	38	27
REDWOOD CITY	San Mateo	42	17	20	13
ALAMEDA	Alameda	43	76	75	62
UPLAND	San Bernardino	44	59	60	59
LYNWOOD	Los Angeles	45	83	83	69
MOUNTAIN VIEW	Santa Clara	46	29	43	
TUSTIN	Orange	47	10	7	2
INDIO	Riverside	48	64	64	25
UNION CITY	Alameda	49	68	71	74
REDLANDS	San Bernardino	50	43	36	23
HEMET	Riverside	51	46	33	22
FOLSOM	Sacramento	52	8	4	3
PLEASANTON	Alameda	53	3	10	18
TURLOCK	Stanislaus	54	44	44	46
APPLE VALLEY	San Bernardino	55	82	82	78
REDONDO BEACH	Los Angeles	56	56	53	67
PICO RIVERA	Los Angeles	57	67	68	
YORBA LINDA	Orange	58	73	72	75
SAN CLEMENTE	Orange	59	72	73	73
LAGUNA NIGUEL	Orange	60	42	30	36
WALNUT CREEK	Contra Costa	61	6	3	5
MONTEBELLO	Los Angeles	62	36	41	50
MILPITAS	Santa Clara	63	21	32	72
HUNTINGTON PARK	Los Angeles	64	71	67	43
DAVIS	Yolo	65	74	70	34
MONTEREY PARK	Los Angeles	66	77	78	
CAMARILLO	Ventura	67	37	48	65
MANTECA	San Joaquin	68	61	59	39
NATIONAL CITY	San Diego	69	7	6	1
PITTSBURG	Contra Costa	70	60	62	32
ENCINITAS	San Diego	72	35	23	40
PALO ALTO	Santa Clara	73	5	9	30
SOUTH SAN FRANCISCO	San Mateo	74	28	56	64
LA HABRA	Orange	75	51	50	53
GARDENA	Los Angeles	76	58	65	52
YUBA CITY	Sutter	77	39	27	38
STOCKTON	San Joaquin	1	54	57	42
FAIRFIELD	Solano	3		35	33
ELK GROVE	Sacramento	2	52	51	20

Rank Based on Sales per Capita*Population Rank*

<i>City</i>	<i>County</i>	<i>Population Rank</i>	<i>Total Retail Sales Rank*</i>	<i>Retail Stores Rank*</i>	<i>Auto Dealers/Supplies Rank*</i>
LATHROP	San Joaquin	80	31	76	
RIPON	San Joaquin	81	38	31	
ESCALON	San Joaquin	84	63	58	
PETALUMA	Sonoma	78	27	29	12
EL PASO DE ROBLES	San Luis Obispo	79	13	8	19
HEALDSBURG	Sonoma	82	9	14	6
SONOMA	Sonoma	83	18	16	47

Source: State Board of Equalization, *Taxable Sales in California (Sales and Use Tax), 2005*

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